knowledgeTools

LOGOS

Release 2.39

User Manual

Table of Contents

1. System Requirements 10
2. An Introduction to Working With knowledgeTools 11
2.1. The knowledgeTools® Method 11
2.1.1. The AND Association 12
2.1.2. The OR Association 12
2.1.3. The EXCLUSIVE Association 13
2.2. The Modules of the LOGOS Server 13
2.2.1. The Dataroom Module 13
2.2.2. The Script Editor 14
2.2.3. The Document Generator 14
2.2.4. The Legal Database 14
2.2.5. The Dossier Module 15
2.2.6. The Risk Analysis Module 15
2.2.7. The Calculator Module 15
2.2.8. The Tutorial Module 16
2.3. The Elements of the User Interface 16
2.4. Navigation in the Tree 18
2.4.1. Moving the Tree 19
2.4.2. Moving the Tree Using the Mouse Scroll Wheel 19
2.4.3. Additional Navigation Options 19
2.4.4. Synopsis: Node IDs and Node Paths 20
2.5. Viewing Options 21
2.5.1. The Presentation Mode 21
2.5.2. Using the Zoom Function 21
2.6. Additional Viewing Options 21
2.6.1. Changing the User Interface Language 21
2.6.2. Displaying the Current Editor of a knowledgeTool 22
2.6.3. Switching Between Normal Mode and Editor Mode 22
2.6.4. Adding and Removing the Elements of the User Interface 22
2.7. The Search Function 23
2.7.1. Basic Search for Nodes 23
2.7.2. Advanced Search Options 24
2.8. Additional Information 25
2.9. Using the Logical Colour Marking System 25
2.10. Locked Nodes 26
2.11. Special Cases 27
2.12. Discussion Forums 27
2.12.1. Creating New Contributions for the Forum 28

2.12.2. Viewing the Forum Contributions of an Individual Node 29
2.12.3. Replying to Forum Contributions 29
2.12.4. Viewing the Forum Contributions for the Entire Tree 29
2.12.5. Deleting Forum Contributions 29
2.12.6. Automatically Sending Forum Contributions by E-Mail 30
2.13. Working With Processes 31
2.13.1. Creating New Processes 31
2.13.2. Saving Processes Manually 32
2.13.3. Opening Existing Processes 32
2.13.4. Managing Processes 32
2.13.5. Renaming Processes 32
2.13.6. Exporting Process Data 33
2.13.7. Deleting a Process 33
2.13.8. Creating a Directory 33
2.13.9. Deleting a Directory 33
2.13.10. Moving a Process 34
2.13.11. Notes 34
3. Creating New Knowledge Trees 35
3.1. Configuring the Technical Tree Properties 35
3.1.1. Title 36
3.1.2. Summary Description / Description 36
3.1.3. Application Type 36
3.1.4. Optional Functions 37
3.2. Making knowledgeTools Accessible to Other Users - Publishing 39
4. Importing and Exporting Data 41
4.1. Data Exchange: Importing a knowledgeTool from a File 41
4.2. Data Exchange: Importing knowledgeTools from Lexogram 42
4.3. Activating an Imported or Newly Created knowledgeTool 43
4.4. Data Exchange: Importing Scripts from a File 43
4.5. Activating an Imported or Newly Created Script 44
4.6. Data Exchange: Exporting a Script to a File 45
4.7. Data Exchange: Exporting Datarooms 46
4.8. Data Exchange: Importing Datarooms 47
4.9. Data Exchange: Exporting a knowledgeTool to a File 47
4.10. Data Exchange: Exporting a knowledgeTool to a "KTD" File 48
5. Editing Knowledge Trees 49
5.1. Editing Node Properties 49
5.2. Editing Titles, Alternative Texts, Node Colours and Weighting 51
5.3. Editing Associations 51

5.4. Automatic Saving 52
5.5. Editing the Position of a Node 52
5.6. Creating a New Node 53
5.7. Creating an Original New Node 53
5.8. Creating an Original New Node Above a Child Node 53
5.9. Creating an Original New Node Behind a Node 53
5.10. Creating an Original New Node Before a Node 54
5.11. Copying a Node 54
5.12. Copying a Tree Section 55
5.13. Creating the Instance of a Node or Tree Section 55
5.14. Removing Nodes 56
5.14.1. Detaching Nodes 56
5.14.2. Extract Node 56
5.14.3. Cutting Nodes 57
5.15. Reinserting Previously Removed Nodes 57
5.15.1. Inserting a Cut Node 57
5.15.2. Inserting a Detached or Extracted Node 57
5.16. Importing Nodes from Other KnowledgeTools 57
5.17. Deleting Nodes 58
5.18. The Undo and Redo Functions 59
5.19. Switching Between the Editor and Normal Modes 59
5.20. Deleting Knowledge Trees 59
5.21. Command Reference 60
6. Editing Additional Information With the Text Editor 62
6.1. Opening the Text Editor 62
6.2. Creating New Texts in the Online Editor 63
6.3. The Text Editing Options of the Text Editor 63
6.3.1. Bold Text 63
6.3.2. Italic Text 63
6.3.3. Underlined Text 63
6.3.4. Inserting Numbering 64
6.3.5. Inserting Bullets 64
6.3.6. Inserting Images 64
6.4. Inserting Links to Websites 64
6.5. Inserting Links to Files 64
6.6. Creating Links to Laws and Decisions 65
6.6.1. Citing Laws 66
6.6.2. Citing Decisions 66
6.6.3. Citing File Numbers 66

6.6.4. Citing Decrees 66
6.7. Inserting Footnotes 67
6.8. Inserting Tables 67
6.9. Additional Text Editor Options 67
6.9.1. Deleting Existing Text With a Mouse Click 67
6.9.2. Cancel Text Editing Without Saving the Text 67
6.9.3. Using the Undo Function 68
6.9.4. Using the Redo Function 68
6.9.5. Copying Contents to the Clipboard 68
6.9.6. Inserting Copied Contents from the Clipboard 68
6.9.7. Cutting Contents 68
7. Document Generation 69
7.1. System Requirements 69
7.1.1. Using the Document Generator 70
7.1.2. Preparing the Knowledge Tree for Document Generation 71
7.1.3. Integrating Input Fields 71
7.1.4. Using the Sidebar 72
7.2. Using Input Fields 73
7.2.1. Creating Input Fields 74
7.2.2. Editing Existing Input Fields 75
7.3. Document Generation 76
7.3.1. Editing Generated Documents 77
7.4. Creating a Table of Contents 80
8. The Legal Database 84
8.1. Viewing Laws 84
8.1.1. Viewing Laws in the Database 84
8.1.2. Accessing Laws in a knowledgeTool 85
8.2. Viewing Decisions 86
8.2.1. Viewing Decisions in the Database 86
8.2.2. Accessing Decisions in a knowledgeTool 87
8.3. Entering Decisions in the Legal Database 87
8.3.1. Adding Courts 88
8.3.2. Adding Decisions to an Existing Court 88
8.3.3. Adding Decisions to a New Court 89
8.3.4. Editing Existing Decisions 89
8.4. Entering Laws in the Legal Database 90
8.4.1. Entering New Laws 90
8.5. Managing Laws and Decisions – Exporting, Importing and Deleting 93
8.5.1. Exporting Laws 93

8.5.2. Deleting Laws 94
8.5.3. Exporting Decisions 95
8.5.4. Deleting Decisions 95
8.5.5. Importing Laws and Decisions 96
9. The Dataroom Module 97
9.1. Creating Datarooms 97
9.2. Dataroom Management 97
9.2.1. Creating and Editing Directories 97
9.2.2. Uploading Individual Files 97
9.2.3. Uploading Multiple Files 98
9.2.4. Editing Files (Moving, Copying, Renaming and Deleting) 99
9.2.5. Deleting Directories 100
9.2.6. Configuring Indexing 100
9.2.7. Indexing Files 101
9.2.8. Deleting Datarooms 102
9.3. Navigation in the Dataroom 103
9.3.1. Finding Files 104
9.4. Using Dataroom Files in Trees 107
9.4.1. Opening Files 109
9.4.2. Downloading Datarooms or Directories 109
9.4.3. Displaying and Hiding the Sidebar 110
9.4.4. Creating Links Between Nodes and Files 110
9.4.5. Deleting Links Between Files and Nodes 111
9.4.6. Searching in Files 111
10. The Script Editor 113
10.1. Importing MS Word Documents as Scripts 113
10.2. Creating New Scripts 114
10.3. Creating Script Contents 114
10.3.1. Creating Sections 115
10.3.2. Creating Text Blocks 115
10.3.3. Renaming Scripts and Setting Links 116
10.4. Editing Existing Scripts 117
10.4.1. Editing Sections and Text Blocks 117
10.4.2. Moving Elements 117
10.4.3. Moving Text Blocks by Using Cut and Paste 117
10.4.4. Merging Text Blocks 117
10.4.5. Deleting Elements 118
10.5. Integrating Existing Scripts in Trees 118
10.6. Links Between Nodes and Text Sections 118

10.6.1. Opening Texts 119
10.6.2. Creating Links Between Nodes and Text Sections 120
10.6.3. Deleting Links Between Nodes and Text Sections 123
10.6.4. Searching In Texts 124
10.6.5. Exporting Scripts as "PDF" and "RTF" Files 125
10.6.6. Deleting Scripts 126
10.7. Managing Access to Scripts 126
11. The Dossier Module 128
11.1. Configuring Dossier Administration 128
11.2. Specifications for Creating Processes and Documents 130
11.2.1. Technical Requirements 130
11.3. Creating Layout Templates 131
11.4. Creating Process Templates 133
11.5. Editing Existing Process Templates 134
11.6. Deleting Existing Process Templates 135
11.7. Working With Dossiers 135
11.7.1. Creating New Dossiers 135
11.7.2. Searching Existing Dossiers 135
11.7.3. Editing or Deleting Existing Dossiers 136
11.7.4. Activating Dossier Contents 136
11.8. Working With Processes 137
11.8.1. Creating New Processes on the Basis of Process Templates 137
11.8.2. Creating New Processes Without Process Templates 138
11.8.3. Searching for Existing Processes 139
11.8.4. Opening Existing Processes 139
11.8.5. Editing and Versioning of Processes 140
11.8.6. Activating Processes 140
11.8.7. Copying Processes 141
11.8.8. Deleting Processes 141
11.9. Using the Document Generator 141
11.9.1. System Requirements for Creating Documents 141
11.9.2. Using the Document Generator 143
11.9.3. Preparing the Knowledge Tree for Document Generation 144
11.9.4. Integrating Input Fields 144
11.9.5. Integrating Master Data Fields 145
11.9.6. Using the Sidebar 146
11.10. Document Generation 146
11.10.1. Editing Generated Documents 147
11.10.2. Saving and Accessing Generated Documents in Dossiers 150

11.11. Working With Files 151
11.11.1. Adding New Files to Dossiers 151
11.11.2. Searching for Existing Files 151
11.11.3. Activating Files 151
11.11.4. Deleting Files 152
11.12. Dossier Notes 152
11.12.1. Creating New Notes 152
11.12.2. Opening and Editing Existing Notes 153
11.12.3. Activating Notes 153
11.12.4. Deleting Notes 153
12. Risk Analysis Using knowledgeTools 154
12.1. Using Risk Analysis in knowledgeTools 154
12.2. Entering Probabilities 154
12.3. Using Expected Values 158
12.4. Additional Functions 161
13. Using the Calculator Module with knowledgeTools 163
13.1. Configuring Calculations – Creating Formula Fields 163
13.2. Possible Calculation Operations and Functions 165
13.2.1. Numerical Values 165
13.2.2. Field Names 165
13.2.3. Possible Calculation Operations and Notation 165
13.2.4. Functions 166
13.3. Performing Calculations 166
13.4. Exporting Entered Values and Calculation Results 167
14. The Tutorial Module 169
14.1. Creating New Tutorials 169
14.2. Assigning Videos and Slides 171
14.3. Creating Scripts for Tutorials 172
14.4. Viewing Tutorials 174
15. User Administration 176
15.1. Creating New Users 176
15.2. Searching for Existing Users 177
15.3. Deleting Existing Users 177
15.4. Creating New User Groups 177
15.5. Searching for Existing User Groups 178
15.6. Deleting Existing User Groups 178
16. Access Rights System 179
16.1. Global Access Rights 179
16.1.1. Supervisor 179

16.1.2. Manager 179
16.1.3. Viewer 180
16.2. Administrative Access Rights 180
16.2.1. User Management Admin 180
16.2.2. Tutorial Admin 180
16.2.3. Tree Admin 180
16.2.4. Laws and Decisions Admin 181
16.2.5. Forum Admin 181
16.3. Tree-Related Access Rights 181
16.3.1. Read Access 181
16.3.2. Edit Access 182
16.3.3. Process Analysis Access 182
16.4. Special Access Rights When Using Add-On Modules 183
16.4.1. Special Access Rights When Using the Dataroom Module 183
16.4.2. Special Access Rights When Using the Dossier Module 183
16.4.3. Special Access Rights When Using the Tutorial Module 184
16.5. Tabular Summary 184
17. Using Statistics 188
17.1. The Analysis of Created Processes 188
17.2. The Graphical Process Analysis 189
17.3. Graphical Process Analysis and Risk Analysis 190
17.3.1. Displaying the Average Probability of Occurrence 192
17.3.2. Displaying the Average Expected Value 193
17.4. The Raw Data Analysis 194
17.5. The User Statistics 195
18. General Administration of the Server 196
18.1. The LOGOS Server Console 196
18.1.1. Starting / Stopping the Server 196
18.1.2. Editing the LOGOS Server Configuration 196
18.1.3. Adding Administrators 198
18.1.4. Changing User Passwords 199
18.1.5. Installing Patches 199
18.1.6 Creating Backups Manually 201
18.1.7. Creating Backups Automatically 202
18.1.8. Restoring Backups 203
18.2. The LOGOS Web Console 204
18.2.1. Accessing the Web Console 204
18.2.2. Starting / Stopping the Server 205
18.2.3. Installing Patches 205

18.2.4. Accessing Log Files 207
18.2.5. Creating Backups 207
19. Handling Technical Problems 209
19.1. Resolving Problems 209
19.2. Reporting Problems 209
20. Final Note 211

Release Notes LOGOS 2.39

The current release 2.39 includes an interface to the German Federal Ministry of Justice's "eNorm" software. eNorm is the main component of the Federal Ministry of Justice's "Electronic Working Aids and Promulgation" project that aims to support compliance with legal form and editing requirements in the drafting of laws and regulations. With the corresponding licence, scripts that have been created in LOGOS will now be able to be exported in an eNorm compatible XML format and then imported to eNorm for further use within the framework of drafting legislation.

Furthermore, various functions, such as the Script Editor and the export datarooms and scripts have been updated and improved.

Berlin, March 2008

1. System Requirements

LOGOS is a web-based multi-user system that allows users to access and exchange data by connecting to a central server using a standard web browser. This data consists primarily of knowledgeTools knowledge trees and the data that is associated with them.
In order to utilize the system, your workstation must meet the following system requirements:

- **Operating system: MS Windows 2000, XP or Vista** (also functions with Linux with a slightly reduced spectrum of operating functions)
- **Screen resolution: 1024 x 768** (Your screen resolution should be at least 1024 x 768 pixels – however, for optimal operation, a higher screen resolution is recommended)
- **Installed web browser** (Internet Explorer version 6 or later, or Mozilla Firefox version 1.5 or later – please note that the function, *Document Generation* is only available when using MS Internet Explorer)
- **Installed Flash Player version 8 or later** (the standard *Flash Player* software can be downloaded free of charge from the following address: "*http://www.adobe.com/shockwave/download/download.cgi?P1_Prod_Version=ShockwaveFlash&promoid=BIOW"*)
- **Activated JavaScript** (The use of JavaScript must be enabled in your browser)
- **Accessing the LOGOS server** (Your workstation must be able to access the computer that the LOGOS server is installed on via http.
  The LOGOS server computer may also be the workstation)
- **Customized security settings** (The ["URL"] address of your LOGOS server should be entered as a "Trusted site" in Internet Explorer in order to be able to use the *Document Generation* function. The security level for the "Trusted sites" must be set at "Low".)
- **Installed Microsoft Office version 2000 or later** (Office is only necessary if you intend to use the function, *Document Generation*

Please do not hesitate to contact us if you require any information concerning the system requirements for server operation.

2. An Introduction to Working With knowledgeTools

2.1. The knowledgeTools® Method

The knowledgeTools® method is used to analyse and illustrate rule-based fields of knowledge. The knowledge is subdivided into individual pieces of information and this individual information is in turn stored in so-called *nodes*. These nodes are then associated with one another in the form of a navigable *knowledge tree*. The principle behind association is to associate the nodes in a way that the result (e.g. of a specified sequence of operations) is placed at the top of the tree as the parent node, and the child nodes, which are the preconditions for the achievement of the result, are placed below it. A knowledge tree of this kind may be freely arranged, thus an individual precondition may also constitute an intermediate result, whose achievement in turn requires the fulfilment of the preconditions that are placed below it. Therefore this method makes the *abstract* illustration of rule-based fields of knowledge possible at any required depth and for every conceivable possibility that exists in order to achieve the result.

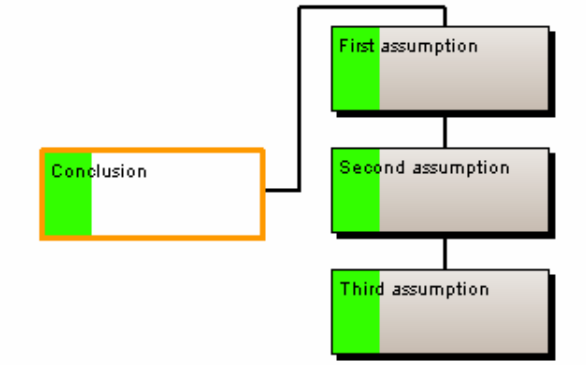
When using such a knowledgeTool, the user can use the mass of abstractly illustrated rules to select those rules that are applicable to their particular situation in order to achieve a *concrete* objective.

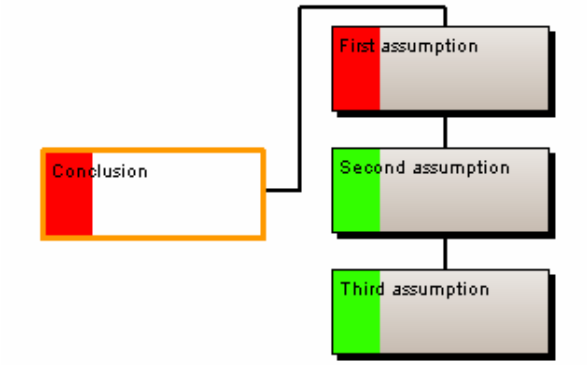
The navigation within a knowledge tree initially occurs from left to right, i.e. in the first step the user initially identifies the objective that is to be achieved and then sees the preconditions on the right that must be fulfilled in order to achieve the objective. In the second step the user examines whether the individual preconditions are actually given from right to left.

The knowledgeTools® method uses three different logical associations to describe the relationship between the parent and child elements: the AND association, the OR association and the EXCLUSIVE association. In addition, each of these associations also has the respective logical inversion, these are: NOT AND, NOT OR and NOT EXCLUSIVE.

This is also supported by the automatic logical colour marking system. The users can classify the statements in a node as either “True” or “False”. The nodes are marked green (for “True”) or red (for “False”). Depending on how the marked nodes are associated with their respective parent nodes (AND, OR, EXCLUSIVE), the parent nodes are in turn automatically marked as “True” or “False” and the logical colour marking is assigned accordingly.

2.1.1. The AND Association

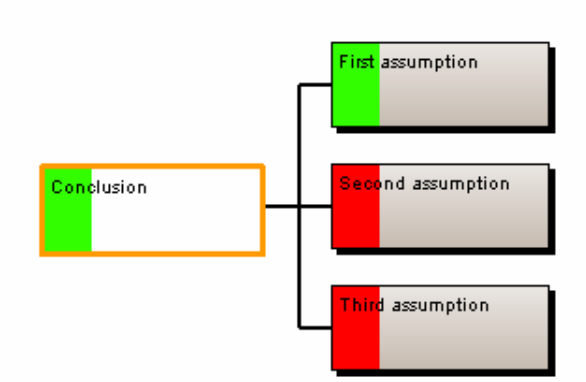


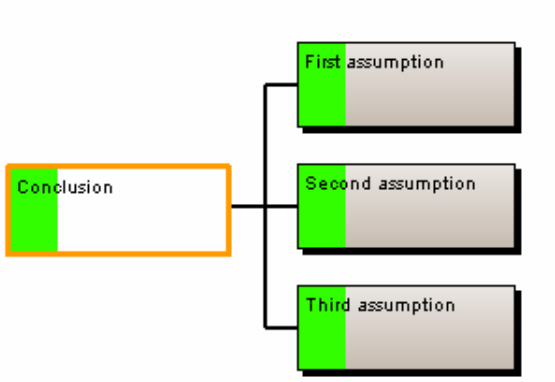


In the case of the **AND association** the statements of **all** the child elements must be true (green) in order for the statement of the parent element to be true.

If the statement of **a single** child element is false (red), then the statement of the parent element is also false.

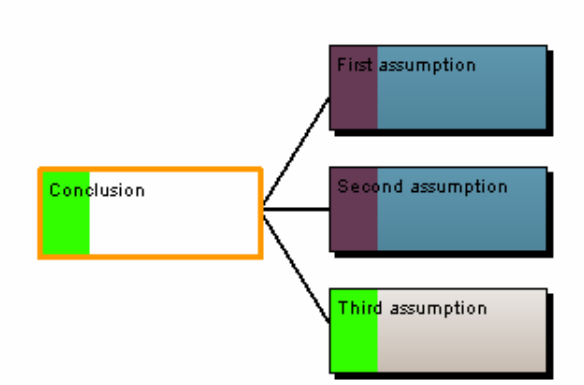
2.1.2. The OR Association





In the case of the OR association it is sufficient for the statement of a **single** child element to be **true** in order for the statement of the parent element to be true.
However it is also possible for **several or all** of the child elements to be true.

2.1.3. The EXCLUSIVE Association

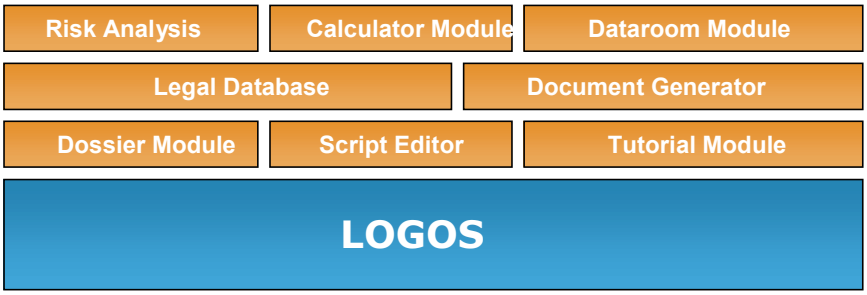


In the case of the EXCLUSIVE association **only one single** child element may be true; however it is **never** possible for several child elements to be true at the same time. The statements of the child elements **rule each other out**.

The knowledgeTools trees can be accessed and used via an interactive, web-based user interface.

2.2. The Modules of the LOGOS Server

LOGOS provides an extensive set of standard functions for creating, editing and publishing knowledgeTools knowledge trees. The system allows users to both view and create knowledge trees and associated contents, e.g. explanatory texts within the same environment.
In addition, it is also possible to activate additional function modules. The activation of the additional modules occurs subject to the corresponding licences.



The add-on modules of LOGOS are described briefly in the following chapters:

2.2.1. The Dataroom Module

The use of the Dataroom Module makes it possible to make datarooms available on the central LOGOS server and to enable users to save and access data in these datarooms on the basis of a tiered system of rights. LOGOS datarooms can also be searched using

extensive search functions. The following document types are indexed when they are uploaded to the dataroom and can then be searched using the full text search: "DOC", "PDF", "XLS", "PPT" and "TXT". In addition, any type of document can be attributed keywords that are freely definable in different categories, which can then be searched for.

The files that are saved in datarooms can also be linked to the individual nodes of a knowledgeTools knowledge tree.

Consequently, the content structures that are illustrated in knowledgeTools can be directly linked in the highest resolution to information that is saved in files. In order to use the Dataroom Module, you require the corresponding licence.

2.2.2. The Script Editor

The Script Editor enables the users to create structured text documents (scripts) in a knowledge tree and to link individual sections of this document to the individual nodes of a knowledge tree. In addition, the users can also use the Script Editor to edit documents that have been created in Microsoft Word and imported into the system. Scripts that are created or edited in this way can then be exported as "PDF" or "RTF" documents (for further editing e.g. in Microsoft Word). Scripts can be accessed throughout the server; the access to the individual scripts is configured in the extended system for the administration of access rights.

The Script Editor is available if the Dataroom Module is activated.

2.2.3. The Document Generator

The Document Generator enables users to create complex structured documents directly from knowledgeTools. These documents are dynamically generated from text modules on the basis of the assigned colour markings.

These documents may be individually edited prior to being published as "PDF" or "RTF" documents. When doing so the user has the option to both individually edit the text modules from the corresponding knowledgeTool or to add new text modules.

In order to use the Document Generator, you require the corresponding licence.

2.2.4. The Legal Database

The Legal Database enables users to even upload laws and decisions in full text into the database or to import laws and decisions from other LOGOS servers. These laws and decisions can then be automatically linked in knowledgeTools, so that the users can directly access a corresponding law or decision in full text from a knowledgeTool.

In order to use the Legal Database, you require the corresponding licence.

2.2.5. The Dossier Module

The results that are achieved with knowledgeTools are saved in *processes*. It is also possible to *dynamically generate documents* on the basis of these processes.

By using the Dossier Module, users have the option to create dossiers on the server for customers or projects, to assign master data (e.g. contact details) to these dossiers and to save their results, i.e. processes and generated documents, in these dossiers. Furthermore, users also have the option to store other files, e.g. Word documents, Excel charts, presentations or graphics in the dossiers.

Besides the tiered system for the *administration of access rights*, the Dossier Module also has an *activation system.* In the default version, dossier contents are only visible to, and can only be used by, the user that has created them. However, it is also possible to activate some or all dossiers for editing and processing by other users.

In order to use the Dossier Module, you require the corresponding licence.

2.2.6. The Risk Analysis Module

knowledgeTools that have the application type, "Risk Analysis", activated, allow users to calculate the probabilities of occurrence of the events that are illustrated in the tree in accordance with the logical structure. Nodes can no longer only be marked as "True" or "False", but may now alternatively be assigned a probability of occurrence between 0% and 100%, which can be used in the calculation of the overall probability of occurrence.

Each individual node may also optionally have a value in EUR (€), USD ($) or GBP (£). The expected value for the node is calculated in accordance with the probability of occurrence of the corresponding node.

The values that are calculated in this way can be downloaded as MS Excel files.

In addition, the graphical process analysis can also be used to calculate the average probabilities of occurrence on the basis of all the existing processes of a knowledge tree version.

In order to use the Risk Analysis Module, you require the corresponding licence.

2.2.7. The Calculator Module

The calculator function enables users to perform calculations within a knowledge tree on the basis of predefined calculation formulas. In order to do so, numerical values and formulas can be entered in the fields and linked to the knowledge tree. The entered numerical values and the results of the calculations can be saved and exported to MS Excel.

In order to use the Calculator Module, you require the corresponding licence.

2.2.8. The Tutorial Module

By using the Tutorial Module, users have the option to create video-based multimedia tutorials within LOGOS. In these tutorials, users can link videos in Flash format to knowledgeTools. By using a time-controlled script, nodes can be accessed in knowledgeTools and assigned colour markings. In addition, you have the option to display individual PowerPoint slides in the tutorials. No additional software is required in order to view the video. The tutorials can be accessed using a unique address (URL) or using the "Tutorials" tab of the user interface.

In order to use the Tutorial Module, you require the corresponding licence.

2.3. The Elements of the User Interface

All the elements of the user interface have distinct names. The names of all the relevant elements are listed below.

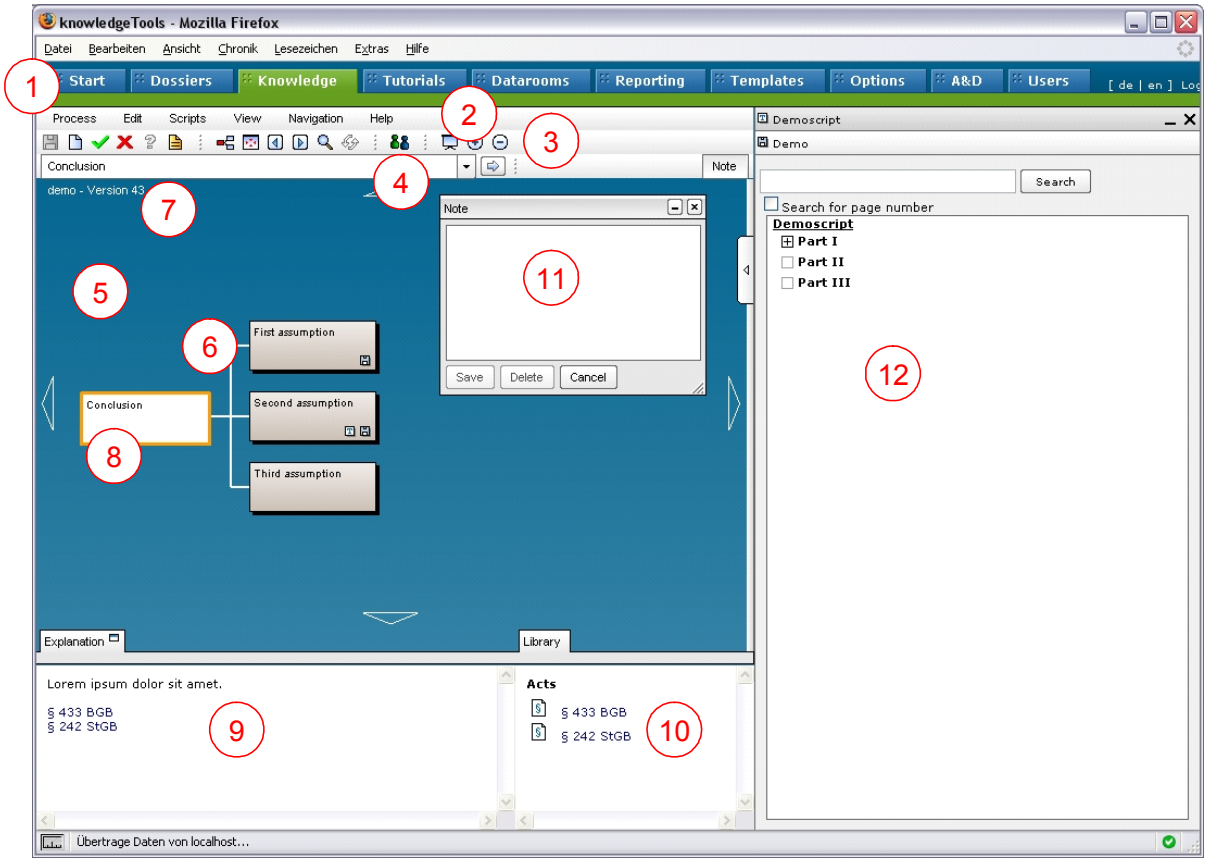


Fig.: The user interface of the knowledgeTools client

1. Tabs

2. Main Menu

3. Toolbar

4. Navigation Bar

5. Tree Window
6. Knowledge Tree
7. Display of Tree, Process and User Name
8. Start Node
9. Additional Information Window (depending on application type of the knowledge tree)
10. "Library" Window with Links
11. Note Window
12. Files, Scripts and Calculator Sidebar

The system provides each user with a customized user interface, depending on their authorization level (Viewer, Manager or Supervisor). This ensures that each user has access to the exact functions that they require for their daily work. In addition, certain functions and, whether or not they are displayed, depend on the modules that have been installed on the server (e.g. Dossier Module or Dataroom Module).
The different views of the information that is stored on the system, as well as the different functions, are accessible using the tabs at the top of the screen:

- By using the "**Dossiers**" tab, you can access your dossiers, as well as the processes, files and documents contained in them (this tab is only visible if the Dossier Module is installed on your server).
- By using the "**Knowledge**" tab, you can access the knowledge trees that have been activated for you. In addition, you can also create new trees and/or edit existing trees in this section, if you possess the corresponding authorizations.
- By using the "**Reporting**" tab, you can access various analyses on the use of the knowledge trees and/or the processes that have been created in them.
- By using the "**Templates**" tab, you can access the process and layout templates that are available on your system. (this tab is only visible if the Dossier Module is installed on your server)
- By using the "**Options**" tab, you can determine which master data fields should be made available for the dossiers on your system (this tab is only visible if the Dossier Module is installed on your server), as well as import and export content, such as knowledge trees, scripts, laws and decisions.
- By using the "**Tutorials**" tab, you can access video-based tutorials and the authoring system for creating such tutorials. (this tab is only visible if the Tutorial Module is installed on your server)
- By using the "**Datarooms**" tab, you can access the dataroom administration. (Only visible if the Dataroom Module is installed on your server.)
- By using the "**Users**" tab, you can access the user database. You can also create, edit or delete users or user groups in this tab.

The "**Start**" tab has an additional special function. This tab is only visible when using the Dossier Module and is the first thing that is displayed after every login.
The three most recent dossiers, processes and files are displayed on the right side of the "**Start**" page. These may include dossiers, processes and files, which have been created by other users and activated for your use, as well as those that you have created yourself. By clicking on the "more…" link and selecting the corresponding option, you can also switch to a general view of all the dossiers, processes and files.
You can change your personal password in the [Settings] section. In order to do so, click on "*Change Password*". Please note when entering your new password, that it should be made up of at least six characters and should not be easy for others to guess.
You can search for dossiers and processes by using the [Search] function. Enter the name of the dossier or process that you want to search for in the input field, specify whether you want to search for a dossier or a process by clicking on one of the selection buttons and then click on the [Search] button.

The display of the "**Users**" tab does *not depend* on the global access rights; the display of this tab only depends on whether the user possesses the necessary "User Admin" *administrative access right*.

2.4. Navigation in the Tree

knowledgeTools trees consist of nodes, which are associated with one another and arranged in levels according to the knowledgeTools logic. Nodes that have subordinate nodes attached to them are referred to as *parent nodes*. Subordinate nodes that are attached to a parent node are referred to as *child nodes*.
If a node has a subordinate level, then this will be indicated by the presence of an arrow on the right-hand side of the node (see figure).

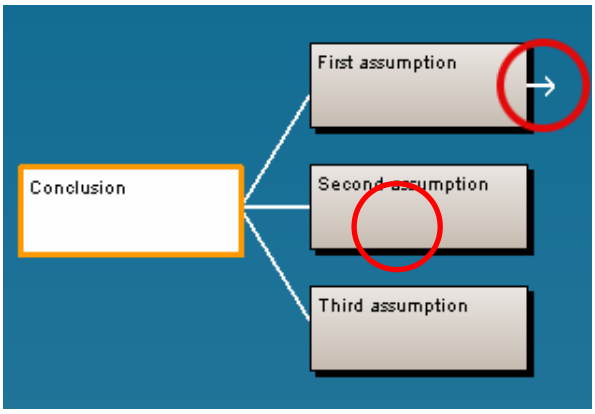


Fig.: The arrow shows that there is a subordinate level

Click on the node in order to open the subordinate levels in the tree. The respective selected node will be marked by an orange-coloured frame.
Click on the subsequent nodes in the levels that are displayed until you reach the required depth of information.
If you click on a node on the same level or a higher level, then any subordinate levels that may have been open behind the displayed node are closed.
In order to quickly access the first node of a tree, the so-called *Start Node*, open the "*Navigation*" menu and click on the "*Go To General Start Node*" option. Alternatively, you may also click on the icon in the toolbar. The tree sections that are already open will not be closed if you use this method.

2.4.1. Moving the Tree

If you want to view a section of the tree that is outside the window, it is possible to reposition the tree according to your needs. For this purpose there are sensitive buttons on the outer edges of the tree view. These extend along the entire height and width of the window and are marked by white arrows.
Move the mouse pointer to the edge of the screen. As soon as you reach the sensitive button, it will be graphically highlighted. Click on the button as many times as is necessary for the tree to move to the required position. The tree always moves away from the edge where the mouse pointer is positioned (e.g. if the mouse pointer is at the top of the screen, the tree will move further down).
You can also use the drag-and-drop function to move the tree. Click on the left mouse button in the blue background area of the tree window and continue to press the mouse button. The tree can now be moved to the required position. When the mouse button is released, the tree is placed in that position.

2.4.2. Moving the Tree Using the Mouse Scroll Wheel

Scroll the wheel upwards to move the tree down. Scroll the wheel downwards to move the tree up. By keeping the "Shift" key pressed, the tree can also be moved to the left or the right.

2.4.3. Additional Navigation Options

Your navigation through the tree is saved in the navigation bar. You can quickly return to an earlier node by opening the navigation bar and clicking on the corresponding node in the list that opens. However it is also possible to navigate step-by-step through the previously accessed nodes by clicking on the "Back" or "Forward" icons in the toolbar.

If you know the path of a required node, it is also possible to enter the path directly into the navigation bar. If you then click on the [Go To] button in the navigation bar, then the relevant tree is opened up until the node in question. If you only know the node ID, you can also enter only the node ID. The path of the node is now displayed in a new window. If you click on the path, then the corresponding node is displayed.

2.4.4. Synopsis: Node IDs and Node Paths

Each node of a tree has a unique *ID number*, as well as a unique *path*. The ID is automatically generated when a node is created and cannot be changed afterwards. In order to display the ID of a node, open the "View" menu and then select the "Display Node ID" option from the "Edit" menu. A white number will be displayed at the bottom right-hand corner of every node – this is the ID of the respective node. Each ID can only exist once in the tree.

However, a node with a specific ID may have *several* associations in a tree, i.e. although the node "physically" only exists once, it has been used by the author in multiple positions in the tree (e.g. due to reasons of efficiency). Therefore the node ID alone does not suffice in order to clearly identify a node. In order to do this, the path of the node is also required. A node may appear in a tree several times with the same ID; however each node may only occupy one specific position in the tree. The node path is a description of the path to a node starting from the start node of the tree.

The path of a node is thus established as described below:

- The first node of a tree does not have a path as it is the starting point of the tree.
- The nodes on the first level of the tree are numbered from top to bottom and consequently have the paths: .1, .2, .3, etc.
- Child nodes that are attached to the first node of the first level are also numbered from top to bottom, however they also receive the path of the parent node as a prefix. These child nodes consequently have the paths: .1.1, .1.2, .1.3 etc. This numbering method is used throughout the entire tree – see the figure below.

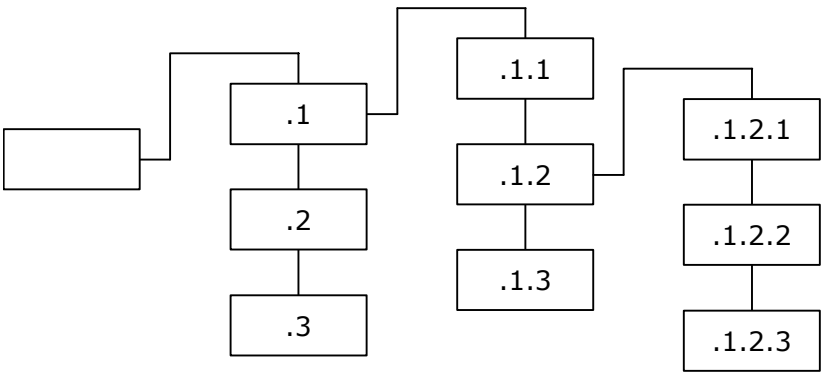


Fig.: An example of node paths

Therefore, by using the combination of the ID and path of the node, one can clearly identify it and localize it in the tree. It is also possible for you to display the path of the node. In order to do so, click on the node in question, open the "Navigation" menu and select the "Node Address" option. The complete address (URL) of the node is now displayed in a new window. The path of the node is displayed at the end of the address after "*path=*".

2.5. Viewing Options

2.5.1. The Presentation Mode

It is also possible to view the tree in a special presentation mode. This mode provides an enlarged view and is particularly suitable for presentations with a projector (beamer).

Select the "*Presentation Mode*" option from the "*View*" menu or click on the icon in the toolbar.

2.5.2. Using the Zoom Function

The user also has the option to enlarge or reduce the size of the display of the tree to meet their needs. In order to enlarge the size of the tree, click on the icon in the toolbar until the tree is displayed in the required size. Alternatively, you can also select the "*Zoom in*" option in the "*View*" menu.

In order to reduce the size of the tree, click on the icon in the toolbar until the tree is displayed in the required size. Alternatively, you can also select the "*Zoom out*" option in the "*View*" menu.

If you want to display the tree in the original size, click on the option, "*Original Size*", in the "*View*" menu.

In addition, you can also enlarge or reduce the size of the tree by using the scroll wheel of the mouse. If you keep the "Ctrl" key on your keyboard pressed and scroll the mouse scroll wheel upwards, the tree is reduced in size. If you scroll the mouse scroll wheel downwards when the "Ctrl" key is pressed, the tree is enlarged.

2.6. Additional Viewing Options

You also have the option to customize the appearance of the user interface according to your requirements.

2.6.1. Changing the User Interface Language

LOGOS is available both in English and in German. Users have the option to switch between the English and German language versions of the user interface during operation by clicking on "EN" or "DE" at the top right-hand corner of the screen. You will

then be prompted to confirm your selection in a pop-up window. Click on the [Accept] button to do so. The knowledgeTools client will be reloaded and the selected user interface language will be used.
Please note that by changing the user interface language, you are only doing so at your own personal workstation. Please also note that changing the user interface language only affects the actual user interface of LOGOS and not the language of the displayed knowledgeTools.

NOTE: Please note that when the language of the user interface is changed, the client is reloaded and any data that has not been saved at the time will be lost.

2.6.2. Displaying the Current Editor of a knowledgeTool

The user has the option to display the users that are online and currently working on a specific knowledgeTool. The condition for this is that the user in question is themself authorized to edit the knowledgeTool.
Click on the "View" menu and select the "Editors Online" option. A window will appear with the names of the users that are currently working on the knowledgeTool.
You have the option to click on the name of one of the editors and to send the user an e-mail. Please note that you will require an e-mail client in order to do this.
You can always update the list of users by clicking on the [Update] button. The list is not updated automatically.

2.6.3. Switching Between Normal Mode and Editor Mode

If you have the authorization to edit the currently opened tree, then you can also switch back and forth between the normal and editor modes.
In order to switch to editor mode from normal mode, open the "*Navigation*" menu and click on the "*Open Structure Editor*" option.
In order to switch back to normal mode from editor mode, open the "*Navigation*" menu and click on the "*Open Published Version*" option.

2.6.4. Adding and Removing the Elements of the User Interface

You have the option to remove individual elements from the user interface by using the "View" menu. This is particularly recommended when working with lower screen resolutions.
In the default version, the first four items in this menu are activated (marked by a tick). By clicking on the corresponding options, it is possible to remove the following elements from the user interface:

- the Tab bar (Knowledge, Dossiers, Tutorials, etc.)
- the Toolbar

- the Navigation bar
- the Additional Information window at the bottom of the screen.

In order to redisplay any of these elements, simply reactivate them by clicking on the corresponding option in the "View" menu.

2.7. The Search Function

By using the search function the user has the option to search for an individual node of a tree, as well as for any additional information that might be attached to the node. There are a variety of search options available for this purpose.

2.7.1. Basic Search for Nodes

It is possible to search for the node, as well as its additional information within the open tree.

1. Open the "*Navigation*" menu and click on the "*Search*" option. Alternatively, you can also click on the icon in the toolbar.
2. Enter your search term(s) in the input field labelled "*Search keys*".
3. Click on the [Search] button.

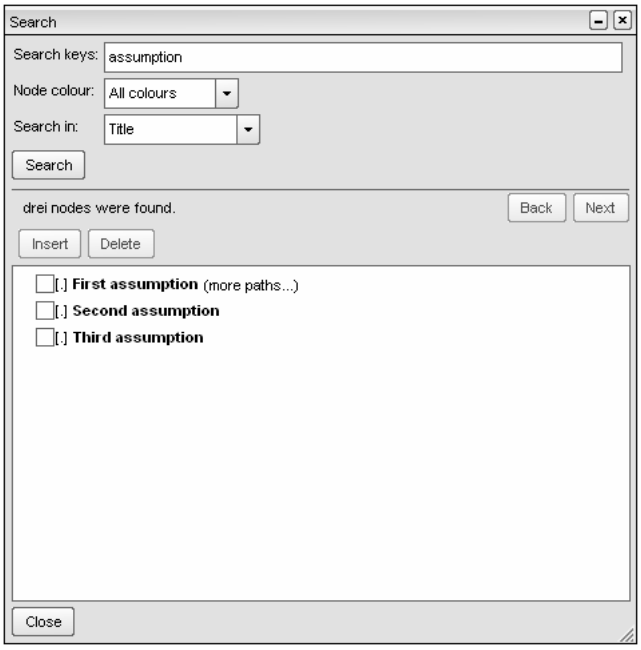


Fig.: The "Search" window with displayed search results

The nodes that match your search criteria are displayed in the search window (see figure above). The search window shows you how many nodes have been found that match the search criteria. The search window displays the first 30 results; if there are more than 30 results, you can display these by clicking on the [Next] button.

The level of the found node in the tree is graphically illustrated in front of the node title. This is displayed by the number of dots inside the square brackets (thus a node that is on the third level of the tree is displayed as follows: […]).
Click on the title of a node to display the corresponding node in the tree.
In addition, nodes that appear in several different positions in a tree are also displayed with the suffix *(more paths…)*. If you click on *(more paths…)*, a new window will open with information on how often the node appears in the tree and where the node in question is positioned in the tree (displayed by using the node path). Click on the node title in order to display the node in question within the tree.

2.7.2. Advanced Search Options

The user has several search options when entering search terms:

- if two search terms are entered after each other (i.e. without an operand)
  term1 term2
  then the texts that contain both *term1* AND *term2* will be searched for
- if only a single search term is entered
  "term"
  then this exact search term will be searched for
- if only part of the search term is entered followed by an asterisk as a wild card
  *term**
  then all words that consist of "term" and any other number of characters will be searched for, e.g. "term-inal" or "term-inology"
- if the search term is entered followed directly by a question mark
  term?
  then all words that consist of "term" and precisely one more character will be searched for, e.g. "terms".

You also have the option to narrow the search criteria. There are a number of options available for doing this:

- With the help of the "*Node Colour*" selection list, you can narrow the search to include only nodes that have been assigned the selected colour marking.
- If node weighting is used in the tree that you have opened, then you can use the coloured check boxes in the row labelled "*Weighting*" to narrow the search to include only the weighting that you have selected. Please note that this option is only displayed in trees where the weighting option is used.
- By using the "*Search in*" selection list, it is also possible to narrow the search to include only the specified contents of the tree. The following search criteria are available:

- *Search in all contents* (basic setting)
- *Search only in node titles*
- *Search only in alternative texts of the nodes*
- *Search only in explanatory texts of the nodes*.

If a tree also possesses further categories of additional information (e.g. details or text modules), then these will also be displayed in the selection list.

2.8. Additional Information

Nodes may also have different types of additional information in the form of texts, files, graphics or links. This additional information is classified in different categories and displayed at the bottom of the screen.

The displayed additional information always belongs to the currently active node. (This is marked by an orange-coloured frame.) If you select another node, then the additional information of the selected node will be displayed.

Depending on the application type of the knowledge tree, the following categories of additional information may be displayed:

- Explanations
- Details
- Text Module (True) or Text Module (False)
- Practice
- Library

Each category has a correspondingly assigned tab at the bottom of the screen. The user can switch between the individual categories of additional information by clicking on the tabs with the mouse.

Please note that these tabs are only displayed if the active node in question actually possesses the corresponding additional information. Therefore it may be the case that a certain node does not have any tabs on display at all, whereas another node may have several tabs on display.

2.9. Using the Logical Colour Marking System

Each node in a tree can be marked as either "True" (green) or "False" (red). The parent nodes are then automatically marked as "True" or "False", depending on the logical association between the nodes, which have been marked in this way and their parent nodes, (see figure).

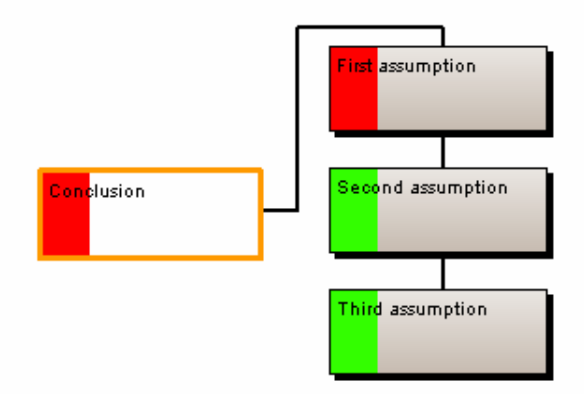


Fig.: Nodes with logical colour markings

These markings are saved in a *Process*. They can be used to create documents and to analyse statistics. Further information on processes is available below.

In order to mark a node as "True" or "False", you must first click on it with the left mouse button. The user now has several options:

- Click on the icon in the toolbar to mark the node as "True" or click on the icon to mark the node as "False". Click on this icon in order to remove the marking that has been assigned to a node.
- Alternatively, you can click once on the node with the right mouse button. The shortcut menu will open and you will be able to select one of the following option; "True", "False" or "Not Checked", by clicking on it once.
- As a further alternative, you can also open the "*Process*" menu in the main menu and select the corresponding option from the menu.
- The final alternative is to assign the marking by using the keyboard. Press the "G" key for "True" (resp. green), the "R" key for "False" (resp. red) or the "U" key for "Not Checked".

2.10. Locked Nodes

In order to avoid logical conflicts, nodes may be locked in certain cases and it will not be possible to assign the logical colour marking to the nodes. These nodes are then coloured blue and the logical colour marking options are disabled when the user clicks on such a node.

This form of locking occurs in two cases:

1. If a user marks a parent node as "True" or "False", then its child nodes are locked.
2. If a node with an Exclusive association is marked as "True", then all the other nodes within this Exclusive association are locked (as such an association may contain one true node).

2.11. Special Cases

The authors of knowledge trees have the option to determine how the logical colour markings within a tree are assigned by the user, by configuring specific settings in the technical properties of a tree.

1. If the "*Two-Valued Logic*" option is activated in the technical tree properties, then the node may only be marked as "True" or unmarked to "Not Checked". The "False" option is not available. This is particularly useful in the case of trees that illustrate processes.
2. If the "*Force Colour Marking*" option is activated in the technical tree properties, then the users may only assign the logical colour marking to child nodes. In this case, only the system can assign the colour marking of the parent node.

2.12. Discussion Forums

The users of the system can have a discussion amongst each other on each individual node in a knowledge tree. In this case, each and every node of a tree can have its own discussion forum.

Contributions to the discussion may be sent directly from the active node in the tree display to the forum. The entries always refer to the respective activated node in the currently open tree.

It is possible to configure the system in a way that either, all of the contributions to all the discussions for all the forums of all the nodes of a tree are displayed at the same time, or that only those contributions to discussions that relate to the forum for the currently selected node are displayed.

NOTE: In order to use the forum function, the "Discussion Forum" option must be activated in the technical properties of the tree in question.

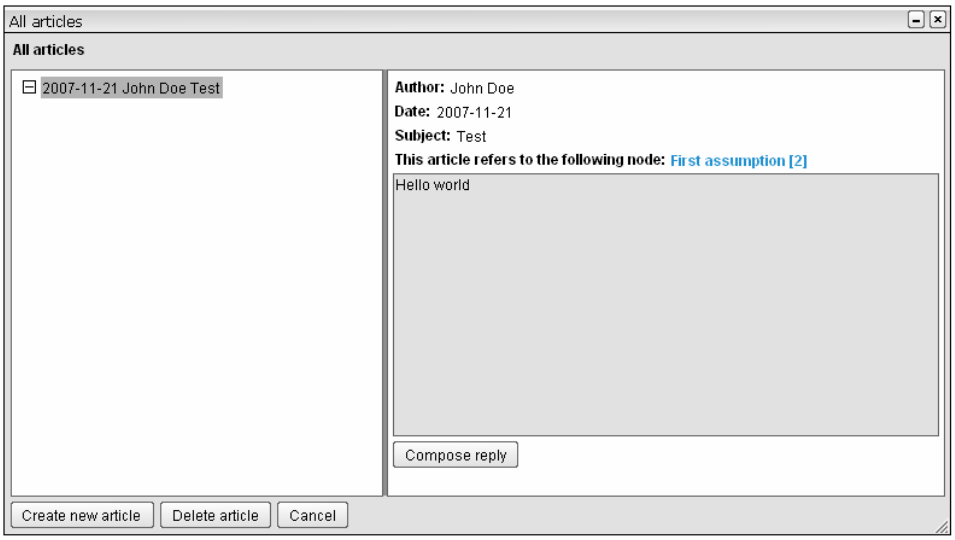


Fig.: The "Forum" window

2.12.1. Creating New Contributions for the Forum

1. Select a node by clicking on it with the mouse.
2. Open the "*Edit*" menu in the main menu and click on the "Create article" option. Alternatively, you also have the option to click on the icon in the toolbar.
3. Enter a relevant subject into the input field labelled "Topic".
4. Enter your contribution in the input field below.
5. When you are finished, click on [Send]. The contribution to the forum has now been created and will be displayed on the left-hand side of the forum window.

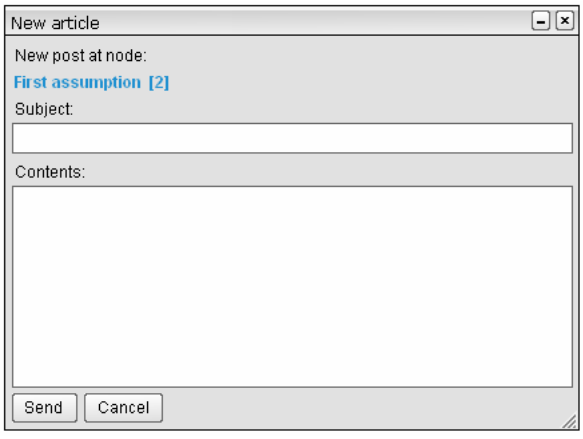


Fig.: The "New Forum Contribution" window

Nodes that already have existing forum contributions are indicated by the presence of a minimized version of the icon at the bottom right-hand corner of the node.

2.12.2. Viewing the Forum Contributions of an Individual Node

There are two available methods to retrieve the forum contributions of an individual node:

- Click on the minimized forum icon at the bottom right-hand corner of the node.
- Open the "*View*" menu in the main menu and select "*Show Forum*".

In the forum window, you will see all the existing contributions to the forum on the left-hand side of the window. Click on the topic of a contribution to read it. Contributions that have already been answered by other users are marked with a "plus" sign in front of the topic. Click on the "plus" sign in order to open up the hierarchy of contributions.

2.12.3. Replying to Forum Contributions

1. Open the forum as described above.
2. Select a contribution by clicking on the topic of the contribution.
3. Click on [Compose reply].
4. Enter your text in the input field above.
5. Click on [Send].

2.12.4. Viewing the Forum Contributions for the Entire Tree

If you do not want to open every single node of a tree to read the respective forum contributions, then you may also view the list of all the forum contributions for the entire tree.

1. Open the "*Navigation*" menu in the main menu and click on the "*All Forum Contributions*" option.
2. Open the forum contributions as already described in order to read or reply to forum contributions.

The node where the respective forum contribution was created is displayed in the full text view of each forum contribution. This information is given under the topic of the contribution. If you click on the node title, which is marked in blue, then you can access the node in question directly.

2.12.5. Deleting Forum Contributions

NOTE: You may only delete existing forum contributions if you possess the "Forum Admin" administrative access right.

1. Open the forum.
2. Click on the contribution that you want to delete.

3. Click on the [Delete Article] button and the selected contribution, as well as any related replies, will be deleted.

2.12.6. Automatically Sending Forum Contributions by E-Mail

You also have the option to automatically send all new forum contributions by e-mail to a predetermined e-mail address. This e-mail address can be determined for the entire server, i.e. all forum contributions for all knowledgeTools will be sent to the same e-mail address. Alternatively, it is also possible to separately determine a recipient address for each knowledgeTool. The user also has the option to use a combination of both variations, i.e. a server-wide recipient address can be determined to which all the contributions from knowledgeTools that do *not* have a separate e-mail address of their own are sent.

The basic requirement for sending forum contributions is that a mail server is configured in the server settings of your LOGOS server.

NOTE: This option must be executed using the LOGOS server console, i.e. on the computer that the LOGOS server is installed on.

1. Open the knowledgeTools server console.
2. Open the "Options" menu and select the "Server Options" option.
3. Enter the address of your mail server in the line labelled "Mail Server".
4. You now have the option to enter an e-mail address, in the line labelled "Forum Recipient e-Mail", to which the forum contributions of **all** the knowledgeTools on your server will be sent. If you do not wish to have such a central recipient address, then please leave the field empty.
5. Restart the server by selecting the "Start Server / Stop Server" option in the "File" menu.

In order to determine a separate recipient address for individual knowledgeTools, please proceed as follows:

1. Open the corresponding knowledgeTool – please note that you must also possess the right to edit the knowledgeTool.
2. Open the "Navigation" menu and select the "Technical Tree Properties" option.
3. Make sure that the check box in front of the entry, "Discussion Forum / Send Forum Contributions To" is activated.
4. Enter the recipient e-mail address in the input field below it.
5. Finish by clicking on the [Save] button.

2.13. Working With Processes

Processes are the central element of your work with LOGOS. Knowledge trees are *abstract* and map *all the conceivable* steps of a process. However, a process is the *concrete* record of which of these steps you, as the user, have edited and in which way. In this way it is possible to save your work for editing at a later stage or for archiving. In the legal field, the user can thus separately edit and save the cases of different clients.

NOTE: Please note that the methods that are described in this chapter only apply if the Dossier Module is **not** installed on your server.
If the Dossier Module is installed on your server, then the methods that are described in the chapter on "The Dossier Module" apply when working with processes.

A (saveable) process is created when you:

- assign **a colour marking** in a tree or
- attach **a note** to the node of a tree.

NOTE: Generally each user always has access to the processes that they have saved. However, if the Dossier Module is being used, then processes can also be activated for other users.

In general, each process is automatically saved as soon as you assign a colour to a node or attach a note to a node. However, we do recommend that you save and manage your processes so that they are easier to find when you require them again.

2.13.1. Creating New Processes

It is possible to save each and every edited version of a knowledge tree (colour marking or attachment of a note) as a process of its own and to later retrieve it and edit it again. When you save a process, the following information is saved and may be recovered when required:

- all the assigned colour markings (True, False or Not Checked)
- all the attached notes
- all the data that you have entered in the input fields of the node within the scope of the colour marking

If you wish to terminate your work with the current process, then select the option, "New", in the "Process" menu or click on the icon in the toolbar. All of the relevant

process contents will be removed (logical colour markings, notes, contents of the input fields), but they will be automatically saved with the corresponding process.

2.13.2. Saving Processes Manually

If you would like to save a process for the first time, then select the "Save" option from the "Process" menu or click on the icon in the toolbar. Enter the name that you want to save the process as in the line labelled "Process" and confirm this action by clicking on [Save].

NOTE: Please note that a process can only be saved after you have created a note or marked the node using the logical colour marking system.

2.13.3. Opening Existing Processes

If you want to open a saved process, then select the "Open" option from the "Process" menu or click on the icon in the toolbar.
All the processes that you have created will be displayed in the new window that opens. Select the process that you want to open and click on it once with the mouse, confirm this action by clicking on [Open].

2.13.4. Managing Processes

You also have the option to manage saved processes by

- renaming or
- deleting them

In addition, it is also possible to organize processes in directories.

2.13.5. Renaming Processes

1. Open the "Process" menu and select the "Manage Processes" option.
2. Select the process that you want to rename from the list that appears by clicking on it with the mouse. The name of the selected process is now displayed in the input field labelled "Process".
3. Delete the old name in the input field labelled "Process" and enter the new name of the process.
4. Click on the [Rename] button.
5. Confirm your entry by clicking on the [OK] button in the next window.
6. Close the "Manage Processes" window by clicking on the [X] button.

2.13.6. Exporting Process Data

The user has the option to export data, which has been entered in a process, as an "XLS" file, e.g. for further processing in MS Excel.

1. Start by opening the corresponding process.
2. Open the "Process" menu and select the option, "Export Process Data".
3. In the dialog box that appears, select whether you want to immediately open the "XLS" file or whether you want to save it to your hard disk.

NOTE: Please note that by doing this, you are exporting the *data* of the process, but not the process itself.

2.13.7. Deleting a Process

1. Open the "Process" menu and select the "Manage Processes" option.
2. Select the process that you want to delete from the list that appears by clicking on it with the mouse. The name of the selected process is now displayed in the input field labelled "Process".
3. Click on the [Delete] button.
4. Confirm deletion by clicking on the [OK] button in the next window.
5. Close the "Manage Processes" window by clicking on the [X] button.

2.13.8. Creating a Directory

In order to ensure clarity, it is possible to create different (sub)directories and to move the saved processes into these or to save processes in a certain directory when it is saved for the first time.

1. Open the "Process" menu and select the "Manage Processes" option.
2. Click on the [Create Directory] button.
3. If you want to create a subdirectory, then first click on the parent folder on the left-hand side of the window and when you have selected the folder that you want to create it in, click on the [Create Directory] button.
4. Enter the name of the new directory in the new window that opens and confirm this action by clicking on the [Create] button.

2.13.9. Deleting a Directory

1. Open the "Process" menu and select the "Manage Processes" option.
2. Select the (sub)directory that you want to delete by clicking on the corresponding folder on the left-hand side of the window with the mouse
3. Click on the [Delete Directory] button

4. A new window will open and you will be prompted to confirm the deletion. Confirm deletion by clicking on the [OK] button with the mouse.

2.13.10. Moving a Process

1. Open the "Process" menu and select the "Manage Processes" option.
2. Select the process that you want to move from the list that appears by clicking on it with the mouse. The name of the selected process is now displayed in the input field labelled "Process".
3. Click on the [Move] button.
4. A new window will appear and you will be prompted to select the folder that you want to move the new process to.
5. Select the new folder and confirm the move by clicking on the [OK] button in the next window.

2.13.11. Notes

The user also has the option to attach individual notes to each and every node of a tree and to save them in a process.

In order to create a new note, select the "Show Note Window" option from the "View" menu or click on the icon in the toolbar. Enter the text of the note in the new window that opens and click on the [Save] button to save the note. If, at this point in time, you have not yet worked in a process, then a new process will automatically be created when you save the note.

If there is a note attached to a node, then this will be indicated by the presence of this yellow icon at the bottom right-hand corner of the node. Click on the icon in order to open the node. Alternatively, you can also do this by selecting the "Show Note Window" option from the "View" menu.

NOTE: Please note that you can only create one note per node.

3. Creating New Knowledge Trees

The Structure Editor provides you with an efficient tool for creating and editing your own knowledgeTools tree. If you possess the corresponding authorizations, then you can switch directly between read and edit mode in the application without having to start a new program.

NOTE: In order to create a new tree in the system, you must be listed as a "Tree Administrator" in the user database.

1. Open your web browser (we recommend that you use Internet Explorer).
2. Enter the address of your LOGOS server and press the "Enter" key (the address is: "*http://your_server_name/knowledgetools/dms*")
3. Login with your login information.
4. Click on the "**Knowledge**" tab at the top of your screen.
5. Click on the [New Tree] button at the bottom of your screen.
6. Enter the **Technical Tree Name** and the **Tree Display Name** and click on the [Create] button. (Please note that the technical tree name may not contain any umlauts, accents or other special characters or spaces.)
7. The tree that you have just created will now appear in the list of your trees.
8. Click on the [Edit] button in front of the name of the tree in order to edit it.

3.1. Configuring the Technical Tree Properties

Knowledge trees have certain technical properties that are configured by the user.
These technical properties influence the appearance of the tree in the knowledgeTool client, the type of additional information that is displayed in the client and the presence of certain functions (e.g. the discussion forum).
After creating a new tree, you should first configure the technical tree properties. Open the "Navigation" menu and click on the "Open Technical Tree Properties" option. The "Technical Tree Properties" window will open.

NOTE: It is always possible to change the technical properties of the tree (with the exception of the technical tree name) at a later stage.

The following options are available when configuring the technical tree properties:

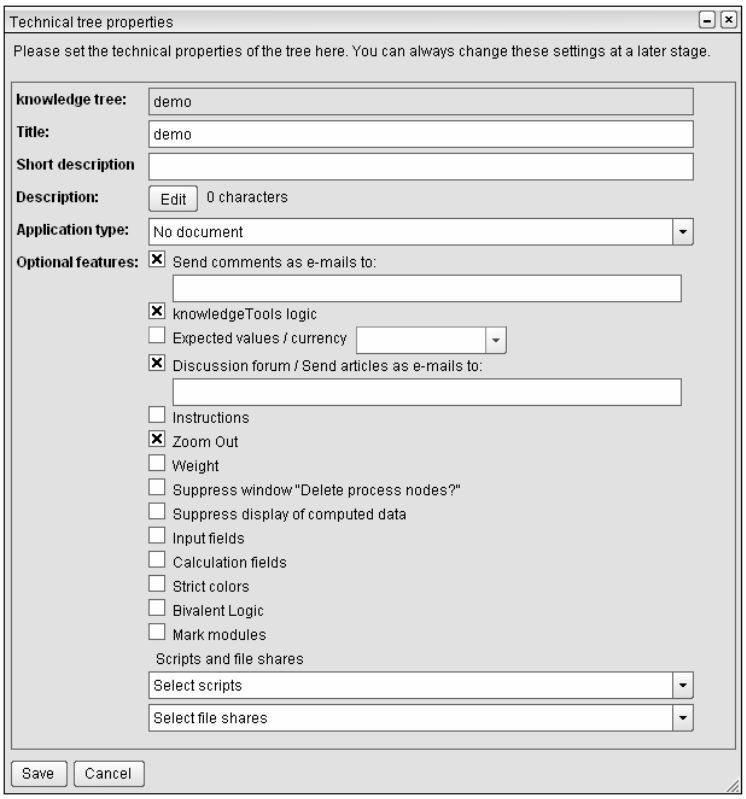


Fig.: The "Technical Properties of Tree" window

NOTE: The technical tree name is displayed in the first field in the line which is labelled "knowledge tree". It is not possible to change the technical tree name at a later stage.

3.1.1. Title

This specifies the title under which the tree will be displayed in the portfolio.

3.1.2. Summary Description / Description

The user has the option to automatically display a splash screen when a tree is opened. This splash screen can display information such as the title and the author of the tree. The splash screen is activated as soon as the user enters any text in the field labelled "Summary Description".

In order to display a more detailed text in the splash screen, use the field labelled "Description". Click on the [Edit] button and enter your text in the window that appears. Click on the [Save] button in this window to save the entered text.

3.1.3. Application Type

This determines whether any additional information is displayed at the bottom of the client screen and the type of information that is displayed.

The available options are:

- ***No Texts*** – there will be no windows displayed with additional information
- ***Standard*** – the "Explanation" and "Library" windows will be displayed with additional information
- ***Standard + Details*** – the "Explanation", "Details", "Practice" and "Library" windows will be displayed with additional information
- ***Document Generator*** – in addition to the "Explanation" and "Library" windows, the text modules for the generation of documents will also be displayed (see also "Advanced Functions" below). This function is only available if you possess the corresponding licence on your server.
- ***Risk Analysis*** – if this application type is activated, then the additional information windows, "Explanation" and "Library", will be displayed. In addition, it is also possible to enter and calculate probabilities and expected values when using this application type. This function is only available if you possess the corresponding licence on your server.

3.1.4. Optional Features

This determines whether the technical functions that are listed below are available in the client or respectively, the tree:

- ***Send Comments as e-mail to*** – Users can send commentaries from the knowledgeTool on contents or technical problems via e-mail to a predetermined recipient; activate the option and then enter the e-mail address of the recipient. In order to use the "Send Comment" function, there must be a mail server configured in the "Server Options" under "Options" in the LOGOS server console.
- ***knowledgeTools logic*** – The user can analyse the knowledge tree with the help of the logical colour marking system and then save these analyses as processes
- ***Expected Values / Currency*** – This option is only available if the user has previously set the application type of knowledgeTools to "Risk Analysis". If this is the case, then users can use this option to determine whether, in addition to entering and calculating probabilities, it should also be possible to enter values. In addition, the selection list behind it can also be used to determine the currency that is to be used in the knowledgeTools client and the corresponding analyses. The users can currently choose between the euro, the US dollar and the pound sterling.
- ***Discussion Forum / Send articles as e-mail to*** – If this option is activated, then the users of the knowledgeTool can also use the forum function. If an e-mail address has been entered in the input field (and a mail server has been

configured in the LOGOS server console), then all new forum contributions will automatically be sent to this address by e-mail.

- ***Instructions*** – If there is no text for a node with an "AND association", then the working instructions can be used to display the alternative text of the child node as a list in tabular form, in the text window of the child node in question.
- ***Link to acts*** – Citations from laws in the additional information texts are automatically linked with the integrated Legal Database (in so far as the law in question is included in the database). This function is only available if you possess the corresponding licence on your server.
- ***Weight*** – By using colour markings (green, red or yellow), nodes can be marked according to their level of importance.
- ***Suppress window "Delete Process Node?"*** – This suppresses the warning message when moving a node referred to by a process in the published version of the same tree.
- ***Suppress Display of Computed Data*** – This suppresses the display of the colour values of the parent nodes, if a colour marking has been set on a child node.
- ***Input Fields*** – This function provides the option to assign the individual nodes of the tree with input fields that can be used for the collection of data and statistical analysis at a later stage or within the scope of document generation.
- ***Calculation Fields*** – If this option is enabled, then you have the option to use the calculator function in the knowledge trees. This function is only available if you possess the corresponding licence on your server.
- ***Strict colors*** – If the force colour marking option is selected, then the user can only mark the child node as "True" or "False".
- ***Bivalent Logic*** – If this option is selected, then the user can only mark the nodes as "True" or "Not Checked". In this case the "False" option is not available. The two-valued logic is particularly useful in the case of trees that illustrate a sequence of processes. Please note that this option is not available if the user has selected the application type, "Risk Analysis".
- ***Mark Modules*** – If this option is activated, then nodes that appear several times in a tree (modules) are marked as such. This is indicated by the presence of the icon at the bottom right-hand corner of the node in question.
- ***Scripts and File Shares*** – If the Dataroom Module is installed on your LOGOS installation (identifiable by the "**Dataroom**" tab at the top of the screen), then you can display directories and files from the dataroom, as well as specially prepared texts, in a sidebar next to the tree and create links between the nodes of the tree and the individual files and/or text sections of a document. When this

option is activated, two selection lists, "Select Files" and "Select Texts" appear. In the first list you can select the datarooms that you want to display the sidebar and in the second list you can determine the documents that you want to display in the sidebar. Both selection lists allow multiple selections.

NOTE: Detailed information on the use of the dataroom and the corresponding sidebar is available further on in the User's Manual.

Click on the [Save] button to save your changes to the settings. You will now be asked whether you would like to reload the client with the new settings. Click on [Reload]; the changes that you have made will come into effect immediately.

NOTE: Detailed information on the editing of trees is available further on in the User's Manual.

3.2. Making knowledgeTools Accessible to Other Users - Publishing

NOTE: knowledgeTools are saved on the server in two versions: in a so-called structure editor version and in a published version. When knowledgeTools are created for the first time or edited, these changes are at first only visible in the structure editor version. In order to make the knowledgeTool accessible to other users, the structure editor version must be published.
Please note that you can only publish knowledgeTools if you have the "Tree Admin" access right.

1. Open your web browser (we recommend that you use Internet Explorer).
2. Enter the address of your LOGOS server and press the "Enter" key (the address is: "http://your_server_name/knowledgetools/dms")
3. Login with your login information.
4. Click on the [Edit] button next to the name of the knowledgeTool that you want to publish. The knowledgeTools client will now open in structure editor mode.
5. Open the "*Navigation*" menu and click on "*Version of the Knowledge Tree*".
6. You can now publish the updated version of the knowledgeTool by clicking on "Publish Updated Version" (marked in blue).
7. Alternatively, you also have the option to publish a specific edited version. In the main area of the window you will see all the versions (edited versions) of the knowledgeTool. A link labelled "Publish This Version" will be displayed under each version. Click on this link to publish the corresponding version.

8. The users that have already been activated for access to the tool will automatically see the newly published version of the tool the next time they access the tool. Those users that have not yet been activated for access to the tool will still have to be activated.

4. Importing and Exporting Data

The user has the option to export knowledgeTools, as well as

- Datarooms
- Scripts
- Laws and
- Decisions

to a file (e.g. on another LOGOS server) and then import them again.

4.1. Data Exchange: Importing a knowledgeTool from a File

knowledgeTools may be transferred from one computer to another in the form of so-called product files or "KIP" files. If you already have such knowledgeTools, then you can import these to your LOGOS server.

NOTE: You must possess the "Tree Admin" administrative access right in order to be able to perform this task.

NOTE: When importing a knowledgeTool that is linked to a script, it is essential that *first* the script and *then* the knowledgeTool are imported.

NOTE: When importing a knowledgeTool that is linked to a dataroom, it is essential that *first* the dataroom and *then* the knowledgeTool are imported.

NOTE: If the knowledgeTool is linked to both a script, as well as a dataroom, then the script and the dataroom must be imported before the knowledgeTool – whereby datarooms must again be imported before scripts.

1. Click on the "**Options**" tab.
2. Please then click on "Import Product File".
3. Click on the [Browse] button in the window that opens and select the directory where the product file that you want to import is saved. Select the corresponding file by clicking on it with the mouse and then please click on the [Open] button.
4. Please then click on the [Upload] button.
5. The task window will open after the successful upload of the product file. In this window, the import of the product file will be displayed as a new task that is to be executed. Please click on the ▷ icon to start the import process. If you want to delete the import task, then please click on the 🗑 icon.

6. After the successful import, the message, "Completed Successfully", will be displayed in the task window. Click on the icon to remove the successfully completed task from the task window.
7. Determine the users that may access the knowledgeTool that has just been imported in the user database.

4.2. Data Exchange: Importing knowledgeTools from Lexogram

Lexogram is an older Windows program for creating knowledgeTools. The user has the option to import knowledgeTools that have been created with Lexogram to the LOGOS server. Lexogram files can be recognized by the "KTD" filename extension.

NOTE: You must possess the "Tree Admin" administrative access right in order to be able to perform this task.

Lexogram saves trees in two files. The first file has the filename extension, "KTL", and the second file has the same name with the filename extension, "KTD". Only the file with the "KTD" filename extension is relevant for importing.

1. Click on the "**Options**" tab.
2. Please then click on "Import KTD File".
3. Click on the [Browse] button in the window that opens and select the directory where the "KTD" product file that you want to import is saved. Select the corresponding file by clicking on it with the mouse and then please click on the [Open] button.
4. Please then click on the [Upload] button.
5. The task window will open after the successful upload of the file. In this window, the import of the "KTD" file will be displayed as a new task that is to be executed. Please click on the icon to start the import process. If you want to delete the import task, then please click on the icon.
6. After the successful import, the message, "Completed Successfully", will be displayed in the task window. Click on the icon to remove the successfully completed task from the task window.
7. Please note that after importing a "KTD" file, you must activate the respective users that you want to be able to access the knowledge tree that you have just imported with the corresponding access rights in the user administration.

4.3. Activating an Imported or Newly Created knowledgeTool

NOTE: When a knowledgeTool is first imported it is not visible to any user. Therefore the users that are to be granted access to this new knowledgeTool must first be activated for the tool in the user administration.
It is only possible to activate a tool for users if you possess the "User Admin" access right.

1. Open your web browser (we recommend that you use Internet Explorer).
2. Enter the address of your LOGOS server and press the "Enter" key (the address is: "http://your_server_name/knowledgetools/dms")
3. Login with your login information.
4. Click on the "**Users**" tab.
5. Enter the first name, surname or e-mail address of the user that you want to grant access to the newly imported knowledgeTool in the field labelled "Search for" and click on [Search].
6. When the search results appear, click on the name of the corresponding user.
7. You will now see all the access rights of the selected user. Click on the white arrow next to "Access rights for knowledge areas".
8. In the "Access rights for knowledge areas" section, you will now see a list of all the available knowledgeTools on the system, including the name of the newly imported knowledgeTool. Check boxes will be displayed next to the name of each knowledgeTool with the following labels: "Read", "Edit" and "Process Analysis".
9. Click on the check box in the column labelled "Read" to only grant the selected user read access to the knowledgeTool; click on the check box in the column labelled "Edit" to allow the user to edit and/or work on the knowledgeTool; click on the check box in the column labelled "Edit" to grant the user the ability to edit the tree structure of the knowledgeTool.
10. Finish by clicking on the [Save] button to apply the changes.

4.4. Data Exchange: Importing Scripts from a File

You also have the option to import scripts from a file (see the section on "The Script Editor" later on in the User's Manual) in the same way as a knowledgeTool. In particular, this becomes absolutely necessary when you want to import a knowledgeTool that is linked to a script. Scripts are also saved as product files with the "KIP" filename extension.

NOTE: You must possess the "Tree Admin" administrative access right in order to be able to perform this task.

NOTE: When importing a script that is linked to a knowledgeTool, it is essential that *first* the script and *then* the knowledgeTool are imported.

1. Click on the "**Options**" tab.
2. Please then click on "Import Product File".
3. Click on the [Browse] button in the window that opens and select the directory where the product file that you want to import is saved. Select the corresponding file by clicking on it with the mouse and then please click on the [Open] button.
4. Please then click on the [Upload] button.
5. The task window will open after the successful upload of the file.
   In this window, the import of the product file will be displayed as a new task that is to be executed. Please click on the icon to start the import process. If you want to delete the import task, then please click on the icon.
6. After the successful import, the message, "Completed Successfully", will be displayed in the task window. Click on the icon to remove the successfully completed task from the task window.
7. Determine the users that may access the script that has just been imported in the user database (see below).

4.5. Activating an Imported or Newly Created Script

NOTE: When a script is first imported it is not visible to any user. Therefore the users that are to be granted access to this new knowledgeTool must first be activated for the script in the user administration.
It is only possible to activate a script for users if you possess the "User Admin" access right.

1. Open your web browser (we recommend that you use Internet Explorer).
2. Enter the address of your LOGOS server and press the "Enter" key (the address is: "http://your_server_name/knowledgetools/dms").
3. Login with your login information.
4. Click on the "**Users**" tab.
5. Enter the first name, surname or e-mail address of the user that you want to grant access to the newly imported knowledgeTool in the field labelled "Search for" and click on [Search].
6. When the search results appear, click on the name of the corresponding user.

7. You will now see all the access rights of the selected user. Click on the white arrow next to "Access Rights Scripts".
8. In the "Access Rights Scripts" section, you will now see a list of all the available scripts on the system, including the name of the newly imported knowledgeTool. You will see check boxes labelled "Read" and "Edit" next to the names of the scripts.
9. Click on the check box in the column labelled "Read" if the selected user is only to be granted read access to the script; click on the check box in the column labelled "Edit" if you want the user to also be able to edit the script.
10. Finish by clicking on the [Save] button to apply the changes.

4.6. Data Exchange: Exporting a Script to a File

Scripts can be exported to a product file in the same way as knowledgeTools and passed on in this form.

NOTE: You must possess the "Tree Admin" administrative access right in order to be able to perform this task.

1. Click on the "**Options**" tab.
2. Please then click on "Manage Scripts".
3. All the scripts that exist on the server will now be displayed in a list. You have the option to export one or more scripts. Select the script that you want to export by clicking on the check box in front of the name of the corresponding script. If you want to export more than one script, then select the additional scripts using the same method.
4. Next, click on the [Export] button.
5. The task window will now open. In this window, the export of the script will be displayed as a new task that is to be executed. Please click on the icon to start the export process. If you want to delete the export task, then please click on the icon.
6. After the successful export, the message, "Completed Successfully", will be displayed in the task window.
   Click on the icon to download the exported script. Please note that if you export several scripts at the same time, only one file will be created.
7. Please then click on the icon to remove the successfully completed task from the task window.

4.7. Data Exchange: Exporting Datarooms

If the Dataroom Module is activated on your LOGOS server, then you have the option to export the datarooms on your server, e.g. to import them to other servers. When they are exported, datarooms are exported to a product file (recognized by the "KIP" filename extension). Please note that, depending on the quantity of data in and the size of the dataroom, this file may possibly require between several hundred megabytes and several gigabytes.

NOTE: You must possess the "Tree Admin" administrative access right in order to be able to perform this task.

1. Click on the "Datarooms" tab.
2. Select the dataroom that you want to export by clicking on it with the mouse.
3. Open the "Settings" menu and select the option, "Export Dataroom as Product File".
4. The task window will now open. In this window, the export of the dataroom will be displayed as a new task that is to be executed. Please click on the icon to start the export process. If you want to delete the export task, then please click on the icon.
5. After the successful export, the message, "Completed Successfully", will be displayed in the task window. Click on the icon to download the exported dataroom.
6. Please then click on the icon to remove the successfully completed task from the task window.

The user has the option to export only the actual data structure of a dataroom as a product file, without the actual files. In this case, only the information on the directory structure of the dataroom and the names of the files that are contained in it are included in the product file. This may, for example, be useful if the dataroom that you want to export contains data quantities that are so large that they would result in the product file now being able to fit on a conventional data carrier.

In order to export a dataroom to a product file without files, start by following steps 1 to 3 described above and then click on the "Configure Task" link under the impending export task in the task window that appears. Next, click on the "Export Files" box. This is enabled in the default version and must be disabled. Please then click on the [Save] button and continue with steps 4 to 6 described above.

4.8. Data Exchange: Importing Datarooms

If the Dataroom Module is activated on your LOGOS server, then you have the option to import datarooms that exist as "KIP" files into your system.

NOTE: You must possess the "Tree Admin" administrative access right in order to be able to perform this task.

NOTE: When importing a knowledgeTool that is linked to a dataroom, it is essential that first the dataroom and then the knowledgeTool are imported.

1. Click on the "**Options**" tab.
2. Please then click on "Import Product File".
3. Click on the [Browse] button in the window that opens and select the directory where the product file that you want to import is saved. Select the corresponding file by clicking on it with the mouse and then please click on the [Open] button.
4. Please then click on the [Upload] button.
5. The task window will open after the successful upload of the file. In this window, the import of the product file will be displayed as a new task that is to be executed. Please click on the icon to start the import process. If you want to delete the import task, then please click on the icon.
6. After the successful import, the message, "Completed Successfully", will be displayed in the task window. Click on the icon to remove the successfully completed task from the task window.

4.9. Data Exchange: Exporting a knowledgeTool to a File

NOTE: You must possess the "Tree Admin" administrative access right in order to be able to perform this task.

1. Click on the "**Knowledge**" tab.
2. Click on the name of the knowledgeTool that you want to export with the right mouse button.
3. Select the "Export" option from the context menu that opens.
4. The task window will now open. In this window, the export of the knowledgeTool will be displayed as a new task that is to be executed. Please click on the icon to start the export process. If you want to delete the export task, then please click on the icon.

5. After the successful export, the message, "Completed Successfully", will be displayed in the task window. Click on the icon to download the exported knowledgeTool.
6. Please then click on the icon to remove the successfully completed task from the task window.

The user has the option to export a knowledgeTool to a product file without including files that have been directly integrated into the tool using the File Managers (i.e. not using links to a dataroom) in the product file. This may, for example, be useful if the knowledge tree that you want to export contains data quantities that are so large that they would result in the product file now being able to fit on a conventional data carrier.
In order to export a knowledgeTool to a product file without files, start by following steps 1 to 3 described above and then click on the "Configure Task" link under the impending export task in the task window that appears. Click on the "Export Files" box next. This is enabled in the default version and must be disabled. Please then click on the [Save] button and continue with steps 4 to 6 described above.

4.10. Data Exchange: Exporting a knowledgeTool to a "KTD" File

Lexogram is an older Windows program for creating knowledgeTools. The user has the option to import knowledgeTools that have been created with Lexogram into their LOGOS server. Lexogram files are recognized by the filename extension, "KTD".
The user has the option to export knowledge trees from their server as a "KTD" file and to then open them with Lexogram. However, due to the limitations of Lexogram, only the tree structure is exported and not all of the additional data, e.g. additional information, linked files, etc...

NOTE: You must possess the "Tree Admin" administrative access right in order to be able to perform this task.

NOTE: Please note that this function is only available on servers that have an MS Windows operating system.

1. Click on the "**Knowledge**" tab.
2. Click on the name of the knowledgeTool that you want to import with the right mouse button.
3. Select the option, "Create KTD File" from the context menu that opens.
4. The task window will now open. In this window, the export of the knowledgeTool will be displayed as a new task that is to be executed.

Please click on the ▷ icon to start the export process. If you want to delete the export task, then please click on the 🗑 icon.

5. After the successful export, the message, "Completed Successfully", will be displayed in the task window. Click on the 💾 icon to download the "KTD" file.
6. Please then click on the 🗑 icon to remove the successfully completed task from the task window.

5. Editing Knowledge Trees

Access to knowledge trees occurs through your portfolio. If you possess the corresponding authorizations, you can also open knowledge trees in your portfolio and edit them.

1. Open your web browser (we recommend that you use Internet Explorer).
2. Enter the address of your LOGOS server and press the "Enter" key (the address is: "http://your_server_name/knowledgetools/dms")
3. Login with your login information.
4. Click on the [Edit] button next to the name of the knowledgeTool that you want to edit and it will open in editor mode.

5.1. Editing Node Properties

At first, newly created knowledge trees consist only of a single empty node (the start node). This node, as well as any other nodes that you create later on, have certain properties that you can edit.

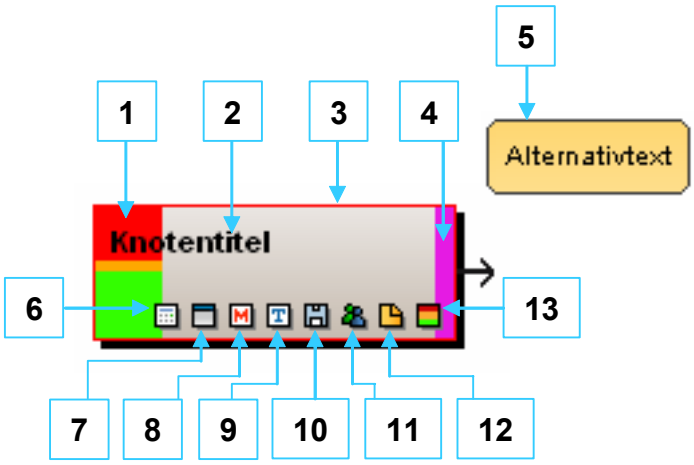


Fig.: The properties of a node

The above illustration shows all the possible properties of a node:

1 – Logical Colour Marking Result
2 – Node Title
3 – Weighting
4 – Colour Marking
5 – Alternative Text
6 – Calculation Field Icon
7 – Input Field Icon
8 – Module Icon
9 – Script Icon
10 – Dataroom Icon
11 – Forum Contribution Icon
12 – Note Icon
13 – Risk Analysis Icon

The properties of a node that can be edited include:

- the node title
- the alternative text
- the node colour (coloured marking on the right-hand side of the node)
- node weighting (in order to identify the relevance of a node)
- the logical association and
- the position of the node within a tree section.

The node ID cannot be edited as it is the unique identification number of each node and is automatically assigned by the system.

The node title, the alternative text, the node colour and the type of logical association can be edited in the "Properties" window. In order to open this window, click on the "Properties" option in the "Edit" menu or the shortcut menu of the selected node. Alternatively, you also have the option to click on the icon in the toolbar.

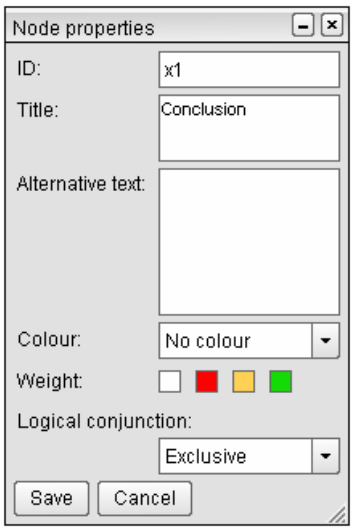


Fig.: The "Node Properties" window

5.2. Editing Titles, Alternative Texts, Node Colours and Weighting

1. Select the node that you want to edit by clicking on it with the left mouse button. If the "Properties" window is not visible, then follow steps 2 and 3, otherwise continue with step 4.
2. Click on the node once with the right mouse button.
3. Select the "*Properties*" option from the menu that opens.
4. Enter the title of the node in the field labelled "Title".
5. Enter the alternative text of the node in the field labelled "Alttext" (the alternative text is displayed when you move over the node with the mouse pointer). If you do not enter anything in the "Alttext" field, then the title text will automatically be used as the alternative text.
6. If required, select the node colour from the drop-down list.
7. If required, select a weighting factor by clicking on either the red, green or yellow check box.
8. Click on the [Save] button to save your changes.

5.3. Editing Associations

Nodes are associated with each other according to the knowledgeTools logic. The type of association between the parent node and the subordinate child node is determined by the parent node.

The following types of association exist:

- And
- Or
- Exclusive
- Not-And
- Not-Or
- Not-Exclusive
- Virtual

The "Virtual" association is the standard association between a parent node and a newly created child node. You can determine the type of logical association in the "Properties" window:

1. Select the respective parent node by clicking on it once with the left mouse button.
2. Open the "Node Properties" window if it is not already open.
3. Click on the "Logical Association" drop-down list and select the required association by clicking on it once with the mouse.
4. Click on the [Save] button to save your changes.

Alternatively, you also have the option to select the logical association with the help of the so-called pie menu:

1. Move the mouse pointer over the association line between the nodes. The existing logical association will then be brightly highlighted.
2. Click on the association line once with the left mouse button and the pie menu will open.
3. Move the mouse pointer to the required logical association. The selection will be highlighted in orange.
4. Confirm your selection by clicking on it with the left mouse button. The association will be changed according to your selection with immediate effect.

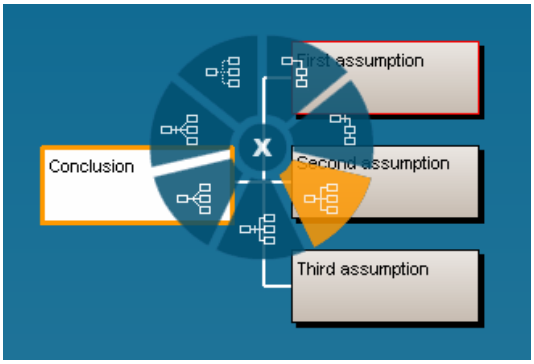


Fig.: The pie menu in the knowledgeTool

5.4. Automatic Saving

The "Automatic Save" function relieves you from having to click on the [Save] button in the "Node Properties" window after changing the properties of the node. In order to save the changes, it suffices to simply click on any other node.

If the "Automatic Save" function has not yet been activated on your system, then open the "*View*" menu and click on "*Automatic Save*".

5.5. Editing the Position of a Node

The user has the option to change the vertical position of a node within a tree section one step at a time.

1. Select the node that you want to move by clicking on it with the left mouse button.
2. Open the "Edit" menu in the menu bar.
3. Click on "Move Node Up" or "Move Node Down".
4. Alternatively, you also have the option to use the or icons in the toolbar.

5.6. Creating a New Node

There are different methods for creating new nodes in the tree structure. The decisive factor is whether the new node will be:

- an original node (i.e. entirely new),
- a copy of a node that already exists or
- an instance of a node that already exists.

When creating copies, you have the option to insert not only individual nodes, but also entire tree sections into the tree structure.

5.7. Creating an Original New Node

1. Click on the node that you want to attach a new node (child node) to.
2. Open the "*Edit*" menu in the menu bar.
3. Click on "Create New Node". Alternatively, you can also click on the icon in the toolbar. This function is also available in the shortcut menu.
4. A new, empty node is now created.
5. Open the "Properties" window.
6. Enter the properties of the new node (node title, alternative text and, where applicable, colour) in the "Properties" window and then save them.
7. Using the "Properties" window, click on the parent node and determine how you want it to be logically associated with the node that has just been created or, use the pie menu.

5.8. Creating an Original New Node Above a Child Node

1. Click on the node that you want to attach a new node above.
2. Open the "Edit" menu in the menu bar.
3. Click on "*Create New Node Above*". This function is also available in the shortcut menu.
4. A new, empty node will now be created above the selected node.
5. Open the "Properties" window.
6. Enter the properties of the new node (node title, alternative text and, where applicable, colour) in the "Properties" window and then save them.

5.9. Creating an Original New Node Behind a Node

With the help of this function, you have the option to create a new node between two nodes (*behind* the first node).

1. Click on the node behind which you want to insert a new node.
2. Open the "Edit" menu in the menu bar.

3. Click on "*Insert New Node Behind*". Alternatively you can also use the icon in the toolbar. This function is also available in the shortcut menu.
4. A new, empty node will now be inserted behind the node in question.
5. Open the "Properties" window.
6. Enter the properties of the new node (node title, alternative text and, where applicable, colour) in the "Properties" window and then save them.
7. If necessary, change the logical association of the new node to the node(s) behind it and before it.

5.10. Creating an Original New Node Before a Node

With the help of this function, you have the option to create a new node between two nodes (*before* the first node).

1. Click on the node that you want to insert a new node before.
2. Open the "Edit" menu in the menu bar.
3. Click on "*Insert New Node Before*". Alternatively you can also use the icon in the toolbar.
4. A new, empty node will now be inserted before the node in question.
5. Open the "Properties" window.
6. Enter the properties of the new node (node title, alternative text and, where applicable, colour) in the "Properties" window and then save them.
7. If necessary, change the logical association of the new node to the node behind it and before it.

5.11. Copying a Node

1. Click on the node that you want to copy.
2. Open the "Edit" menu in the menu bar.
3. Click on "*Copy Node"*. Alternatively, you can click on the icon in the toolbar. This function is also available in the shortcut menu.
4. Click on the node to that you want to attach the copy of the node to as a child node.
5. Open the "Edit" menu in the menu bar.
6. Click on "*Insert*". Alternatively, you can click on the icon in the toolbar. (This function is also available in the shortcut menu.) The copy of the node will now be created.
7. Open the "Properties" window.

8. Using the "Properties" window, click on the parent node and determine how you want it to be logically associated with the node that has just been created or, use the pie menu.

5.12. Copying a Tree Section

1. Click on the parent node of the tree section that you want to copy.
2. Open the "Edit" menu in the menu bar.
3. Click on "*Copy Branch*". Alternatively, you can click on the icon in the toolbar. This function is also available in the shortcut menu.
4. Click on the node to that you want to attach the copy of the tree section to.
5. Open the "Edit" menu in the menu bar.
6. Click on "*Insert*". Alternatively, you can click on the icon in the toolbar. (This function is also available in the shortcut menu.) The copy of the tree section will now be created.
7. Open the "Properties" window.
8. Using the "Properties" window, click on the parent node and determine how you want it to be logically associated with the tree section that has just been created or, use the pie menu.

5.13. Creating the Instance of a Node or Tree Section

Contrary to when creating a copy (where a "physical" copy is created, which can be edited independently from the original), when the instance of a node or a tree section is created, it is a reference to the original. This means that any changes that are made to the instance also affect the original and vice versa.

Creating an Instance:

1. Click on the node that you want to create an instance of.
2. Open the "Edit" menu in the menu bar.
3. Click on "*Memorise Node*". Alternatively, you can click on the icon in the toolbar.
4. Click on the node that you want to attach the instance to or above.
5. Open the "Edit" menu in the menu bar.
6. Click on "*Insert*". Alternatively, you can click on the icon in the toolbar. (This function is also available in the shortcut menu.) The instance is now created.
7. Open the "Properties" window.

8. Using the "Properties" window, click on the parent node and determine how you want it to be logically associated with the instance that has just been created, or use the pie menu.

5.14. Removing Nodes

The user also has the option to remove nodes from the tree structure. However, these nodes are not deleted from the database, but can later be reinserted into the tree structure.

5.14.1. Detaching Nodes

The "Uncouple Node" option removes the node in question from the tree structure. In this case, the node is not copied to the clipboard, but is moved to the recycle bin. In addition, all the child nodes of the detached node are also removed from the tree structure and moved to the recycle bin.

1. Click on the node that you want to detach.
2. Open the "Edit" menu in the menu bar.
3. Click on "*Uncouple Node*". Alternatively, you can click on the icon in the toolbar. (This function is also available in the shortcut menu.)

5.14.2. Extract Node

The "Extract Node" option removes the node in question from the tree structure. In this case, the node is not copied to the clipboard, but is moved to the recycle bin. Contrary to when you detach a node, this option only has an effect on the selected node and not on the respective child nodes of the node in question, which will remain in the tree structure.

1. Click on the node that you want to extract. This node must be positioned between a parent node and at least one child node.
2. Open the "Edit" menu in the menu bar.
3. Click on "*Extract Node*". Alternatively, you can click on the icon in the toolbar. (This function is also available in the shortcut menu.)
4. The extracted node disappears and the subsequent child node(s) take its place. The logical association remains the same as it was between the parent node and the extracted node.

5.14.3. Cutting Nodes

The "Cut Node" option removes the node in question from the tree structure and copies the node to the clipboard. The cut node is shaded grey until it is inserted at another position in the tree.

1. Click on the node that you want to cut.
2. Open the "Edit" menu in the menu bar.
3. Click on "*Cut Node*". Alternatively, you can click on the icon in the toolbar.

5.15. Reinserting Previously Removed Nodes

As described above, the user has the option to reinsert nodes that have been removed from the tree. The procedure for inserting removed nodes depends on how the node has been removed from the tree structure.

5.15.1. Inserting a Cut Node

1. Click on the node in the tree structure where you want the cut node to be inserted.
2. Open the "Edit" menu in the menu bar.
3. Click on "*Insert*". Alternatively, you can click on the icon in the toolbar.

5.15.2. Inserting a Detached or Extracted Node

1. Click on the node in the tree structure where you want the detached or extracted node to be inserted.
2. Open the "*Navigation*" menu.
3. Click on "Recycle Bin" and the "Recycle Bin" window will open. Alternatively, you can click on the icon in the toolbar.
4. Click on the [Search] button in the "Recycle Bin" window. You will now see a list of all the nodes that exist in the database and are not connected to the tree structure.
5. Select the node that you want to insert in the tree structure from the list by clicking on it with the mouse. You may select more than one node.
6. Click on the [Insert] button.

5.16. Importing Nodes from Other KnowledgeTools

The user also has the option to import nodes or entire tree sections from an existing knowledgeTool to the knowledgeTool that they are currently editing. The condition for this is that:

- both tools (source and target) are in the same LOGOS server system

- the user has read and write access rights (structure editor rights) to both the tools.

Proceed as follows if you want to import one or more nodes from another knowledgeTool:

1. Open the knowledgeTool that you want to import from in structure editor mode.
2. Navigate to the node that you want to import the tree section from.
3. Make a note of the number that is displayed at the bottom right-hand corner of the node (node ID).
4. Open the knowledgeTool that you want to import to in structure editor mode.
5. Click on the node that you want to attach the imported node(s) to.
6. Open the "Edit" menu in the menu bar.
7. Click on "*Import Tree Section*". Alternatively you can also click on the icon in the toolbar.
8. Select the knowledgeTool that you want to import from in the "Tree Name" list in the window that opens. (One click of the mouse on the first tree name that is displayed in the list opens the entire list.)
9. Enter the node ID of the node that you want to import in the field labelled "Node ID". Please note that if the node that you have selected has child nodes of its own, then these will also be imported.
10. Click on the [Import] button.

5.17. Deleting Nodes

It is only possible to delete nodes from the database that have previously been detached or extracted.

1. Click on the node that you want to detach or extract.
2. Open the "Edit" menu in the menu bar.
3. Click on "*Uncouple Node*" or "*Extract Node*".
4. Open the "*Navigation*" menu.
5. Click on "*Recycle Bin*" and the "Recycle Bin" window will open. Alternatively, you can click on the icon in the toolbar.
6. Click on the [Search] button in the "Recycle Bin" window. You will now see a list of all the nodes that exist in the database and that are not connected with the tree structure.
7. Select the node that you want to delete from the list by clicking on it with the mouse. You may select more than one node.
8. Click on the [Delete] button.

NOTE: The node will be immediately deleted without any additional steps!

You also have the option to delete the entire contents of the recycle bin by clicking on the [Delete All] button.

5.18. The Undo and Redo Functions

By using the undo function, you can undo all changes that have been made to the node properties, including changes to the additional information of the node.

Move the mouse pointer to the icon in the toolbar. A text, shaded in yellow, will appear indicating changes that you can undo by clicking on the icon. Click on the icon to undo the change.

As the counterpart to the undo function, the user can also use redo function. Move the mouse pointer to the icon in the toolbar. A text, shaded in yellow, will appear showing you the changes, which have been effected by clicking on the undo icon, that can be redone or cancelled by clicking on the icon. Click on the icon to cancel the changes that have been made by clicking on undo.

5.19. Switching Between the Editor and Normal Modes

When you are in editor mode, you have the option to access different views of the open knowledgeTool. These views can be configured in the "*Navigation*" menu:

- **Display Preview**: this option opens the current edited version of the knowledgeTool in normal mode. A preview of how the knowledgeTool would look to users if it was to be displayed at that time will be displayed.
- **Open Published Version**: this option displays the published version of the knowledgeTool in normal mode.

When you are in the "Display Preview" or "Open Published Version" views, you can switch back to editor mode at any time by opening the "*Navigation*" menu and clicking on the "*Open Structure Editor*" option.

5.20. Deleting Knowledge Trees

NOTE: This function is only available if you possess the "Tree Admin" administrative access right and also have at least read access to the knowledge tree that you want to delete.

NOTE: Please note that if you delete a knowledge tree, you will also delete all of the processes and templates that relate to the knowledge tree. However, you will be informed of which processes and templates would be deleted.

In order to delete a knowledge tree, proceed as follows:

1. Click on the "**Knowledge**" tab.
2. Click on the name of the knowledge tree that you want to delete with the right mouse button and select the "Delete..." option from the shortcut menu that opens. Alternatively, you can also click on the icon in front of the name of the knowledge tree.
3. A window will appear and you will be asked whether you really want to delete the selected knowledge tree. If there are processes or templates that relate to the tree that you want to delete, then these will also be displayed in the window. Click on the [Delete] button to confirm the deletion of the knowledge tree.
4. Next, a task window will appear where the deletion of the knowledge tree will be displayed as a new task that is to be executed. Please click on the icon to start the deletion process. If you want to cancel the deletion, then click on the icon.
5. After the successful deletion of the knowledge tree, the message, "Completed Successfully", will be displayed in the task window. Click on the icon to remove the successfully completed task from the task window.

5.21. Command Reference

An overview of the icons that are used in the toolbar of the structure editor, and the functions that are attributed to them, are listed below:

Create New Node: creates a new, empty node as a child node of the selected node.

Insert New Node Before: inserts a node before the selected node.

Insert New Node Behind: inserts a node behind the selected node.

Cut Node: cuts the activated node out of the tree structure and copies it to the clipboard.

Extract Node: removes a node that is positioned between a parent node and at least one child node from the tree structure and moves it to the recycle bin; any possible subsequent child nodes remain in place.

Uncouple Node: removes a node from the tree structure and moves it to the recycle bin; any possible attached child nodes are also removed.

Copy Node: copies the activated node to the clipboard; any possible attached child nodes are not also copied.

Copy Branch: copies the activated node, including all of its child nodes, to the clipboard.

Insert: pastes the node(s) that are in the clipboard behind the selected node.

Memorise Node: creates an instance of the activated node in the clipboard.

Insert Node Above: inserts the node in the clipboard above the selected node.

Import Tree Section: imports a tree section from another knowledgeTool.

Properties: opens the "Properties" window and displays the properties of the activated node.

Move Node Up: moves a node up one position within a tree section.

Move Node Down: moves a node down one position within a tree section.

Edit Input Fields: opens the dialog box for creating and editing input fields.

6. Editing Additional Information With the Text Editor

Depending on the application type that you have selected in the "Technical Tree Properties" window, you will have different categories of additional information available to you (see chapter 3.1.3) This additional information may consist of texts, images or links.

The creation and editing of the additional information occurs using an online editor, i.e. directly in the browser window and without the use of any additional software on the part of the user.

System requirements for the use of the Text Editor:

- **Installed Browser: Microsoft Internet Explorer version 6 or later**
- **Activated JavaScript**
- **Editorial Write Authorization**

NOTE: When using a browser other than Microsoft Internet Explorer, the functions of the Text Editor are only available to a limited extent.

6.1. Opening the Text Editor

1. Open the tree that you want to edit in structure editor mode.
2. Select the node to that you want to add the additional information to or that you want to edit the existing additional information of.
3. In the additional information window, every available text category (e.g. "Explanation" or "Text Module (True)" will be represented by a tab. Click on the required tab in order to select the text category that you want to edit.
4. The icon will be displayed at the top right-hand corner of each tab. Click on the icon to edit the text of the corresponding category.

When a category is selected, the Text Editor will open (see next figure).

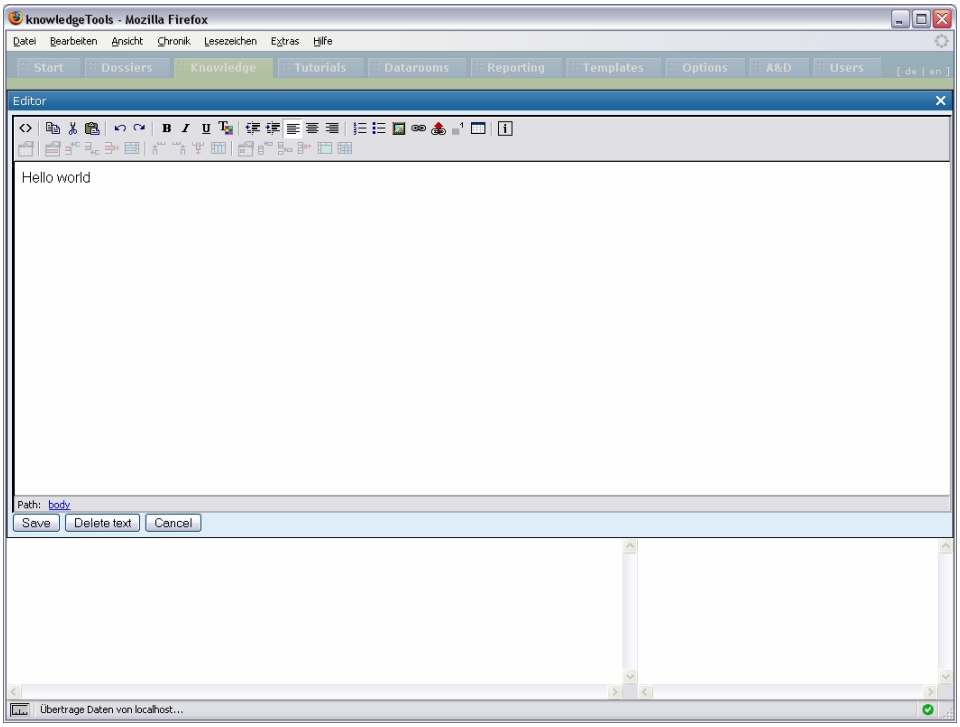

knowledgeTools - Mozilla Firefox
Datei Bearbeiten Ansicht Chronik Lesezeichen Extras Hilfe
Start Dossiers Knowledge Tutorials Datarooms Reporting Templates Options A&D Users
Editor
Hello world
Path: body
Save Delete text Cancel
Übertrage Daten von localhost...

Fig.: The Text Editor

6.2. Creating New Texts in the Online Editor

1. Enter your text in the text input field under the toolbar.
2. Save the text by clicking on the [Save] button. The text editor view will now close and you will automatically return to the tree view.

NOTE: When entering a detailed text, you must also enter a title for the text.

6.3. The Text Editing Options of the Text Editor

There are a variety of available options for formatting the entered text.

6.3.1. Bold Text

Select the text that you want to make bold with the mouse and then click on the **B** icon.

6.3.2. Italic Text

Select the text that you want to make italic with the mouse and then click on the *I* icon.

6.3.3. Underlined Text

Select the text that you want to underline with the mouse and then click on the U icon.

6.3.4. Inserting Numbering

Click on the icon to insert a numbered list. Click on the same icon again to go back to entering normal text.

6.3.5. Inserting Bullets

Click on the icon to insert a bulleted list. Click on the same icon again to go back to entering normal text.

6.3.6. Inserting Images

1. Click on the position in the text input field where you want to insert an image.
2. Click on the icon.
3. Click on the [Browse] button in the dialog box that opens.
4. Browse through your local PC for the image file that you want to insert; select the file by clicking on it once with the left mouse button and then click on [Open].
5. Confirm your selection by clicking on the [OK] button. The image will now be inserted into your document and uploaded to the LOGOS server.

6.4. Inserting Links to Websites

You also have the option to define a word within a text as a link to a website. This link will then appear both within the running text and in the "Library" window.

1. Select the word that you want to define as a hyperlink with the mouse.
2. Click on the icon.
3. Enter the address (URL) of the website that you want to insert a link to in the field labelled "URL".
4. Optionally, you can also enter a text in the field labelled "Tooltip". This text will then be displayed when the user moves the mouse pointer over the link.
5. Save the information you that have entered by clicking on the [OK] button.

6.5. Inserting Links to Files

You also have the option to define a word within a text as a link to a file. This link will then appear both within the running text and in the "Library" window. In order to do this, the file in question must first be uploaded to the LOGOS server. This ensures that when your knowledgeTool is transferred to another LOGOS server installation, the linked file will also be transferred.

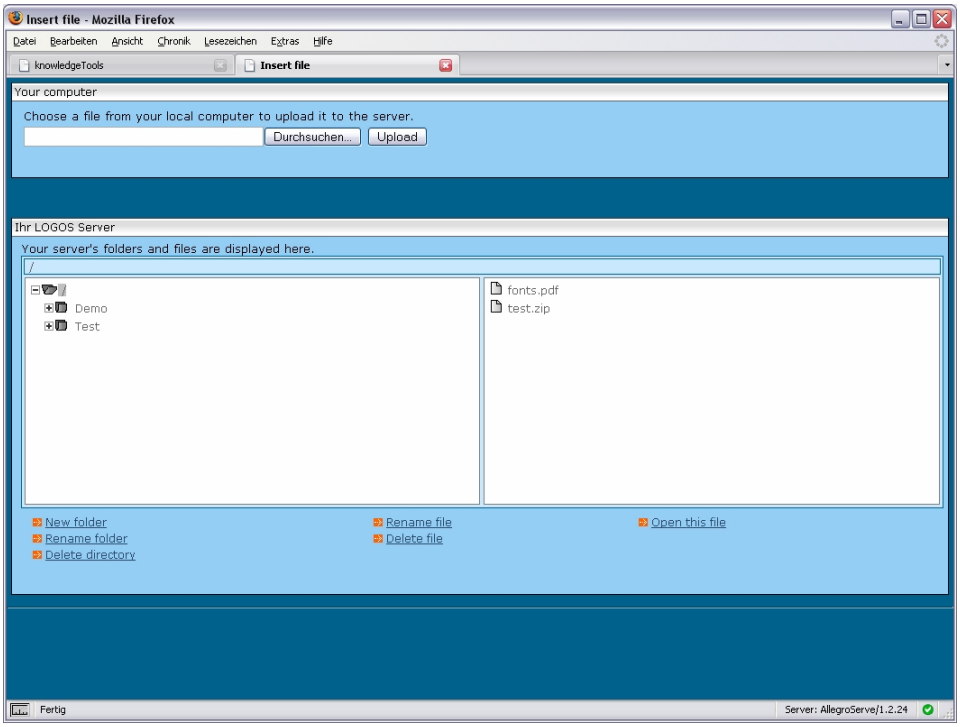


Fig.: The dialog window for uploading and linking files

Uploading and Linking Files

1. Select the word that you would like to define as a link to a file with the mouse.
2. Click on the icon.
3. Click on [Browse].
4. Select the file that you want to upload and confirm this selection by clicking on [Open].
5. Click on [Upload]. The file will now be uploaded to the server and will then be displayed on the right-hand side of the window.
6. Select the file by clicking on it with the left mouse button.
7. Click on "*Link Selected File*". The dialog box will close and the selected word will be displayed as a link.
8. Finish by clicking on [Save] to save the text.

6.6. Creating Links to Laws and Decisions

There is a Legal Database integrated in the LOGOS server. If the texts of additional information contain references to laws or decisions, then these are automatically recognized and linked to the corresponding entries in the Legal Database. The user can access the respective law or decision in full text by clicking on such a link.

In order for laws and decisions to be automatically recognized and correctly linked by the system, it is necessary to observe certain standards when citing them.

6.6.1. Citing Laws

- The first component can be either one or two section marks (§), the text "Section" or the "s." the abbreviation for section.
- The next component is a figure (regulation number). If the figure also has a lower-case letter (without a space) after it, then this lower-case letter is part of the regulation number.
- The last component is a character string which must fit onto a list of the laws.
- In between there may be any character string, as long as it is not the same as one of the words on the list of laws.

Examples:

- **§ 167 of the BGB** – Normal case: section mark(s), space, regulation number, space, abbreviation of the law
- **§ 433 subsection 1 sentence 1 of the BGB** – Subsection may be abbreviated by placing the number in bracket "(1)"; sentence is not abbreviated
- **§§ 606 - 620g of the ZPO** – there are no spaces for standards that contain lower-case letters

6.6.2. Citing Decisions

A decision consists of the following text components:

- The first component is either one of the courts (BAG, BFH, BGH, BVerfG, BVerwG, KG, OGB, BayObLG, EGMR) or a court with an indication of place in form of "LG", "OLG", "FG" or "VG", and then the place name and an optional Roman numeral. In the second case, everything together provides the name of the court.
- The indication of place may contain any special characters; it is recognized only by the separating space.
- The file number is at the end (see below).
- In between there may be any character string, as long as it is not the same as one of the file numbers and does not contain a semicolon.

6.6.3. Citing File Numbers

A file number consists of the following text components:

- Senate: a Roman or Arabic numeral between 1 and 15, i.e. 1-15 or I-XV
- Type of proceedings: 1-4 letters
- Process number: 1-5 letters/2 letters e.g.: 3/98 or 10953/02

6.6.4. Citing Decrees

A decree consists of the following text components:

- Start text "Tz."
- Two-digit number, e.g. "03.18" (here again, a lower-case letter may be appended to the number, e.g. "8b.03")
- Any text, providing it does not contain a decree name
- The name of the decree

Decrees are saved in the database as laws; therefore this is technically only a different method to link laws.

6.7. Inserting Footnotes

Click behind the text in the text input field where you want to insert a footnote and then click on the icon. A pink box will appear at this position; click in the middle of this box and enter the text of the footnote in the box.

6.8. Inserting Tables

Click on the position in the text input field where you want to insert a table and then click on the icon.

You can now determine the properties of the table in the dialog box that appears:

- *Rows* determines the number of rows in the table
- *Cols* determines the number of columns in the table
- *Width* determines the width of the table; you may either enter a percentage value or an absolute value in pixels
- *Alignment* determines the horizontal and vertical alignment of the table
- *Border Thickness* determines the thickness of the borders of the table (if a value of 0 is entered then the borders of the table are not visible).
- *Cell Spacing* and *Cell Padding* determine the inner and outer cell margins of the table.

Once you have determined the properties of the table, you can insert the table into your document by clicking on the [OK] button.

6.9. Additional Text Editor Options

6.9.1. Deleting Existing Text With a Mouse Click

In order to entirely delete existing text, click on the [Delete Entire Text] button.

6.9.2. Cancel Text Editing Without Saving the Text

Click on the [Cancel] button to leave the editor without saving any changes that may have been made.

6.9.3. Using the Undo Function

By using the undo function, you can undo changes that have been made to your document. In order to do so, click on the icon.

6.9.4. Using the Redo Function

By using the redo function, you can cancel changes that have been made to your document using the undo function. In order to do so, click on the icon.

6.9.5. Copying Contents to the Clipboard

In order to copy text to the clipboard, select the corresponding text with the mouse and click on the icon.

6.9.6. Inserting Copied Contents from the Clipboard

In order to copy text from the clipboard into your text, click on the position where you want to paste the text in the text input window with your mouse. Click on the icon to paste the contents of the clipboard.

6.9.7. Cutting Contents

In order to cut out text, click on the icon. The cut text is copied to the clipboard and can then be pasted into the text by clicking on the icon.

7. Document Generation

By using the document generator, you can dynamically generate documents from individual text modules, depending on the previously assigned logical colour marking. In order to do this, the knowledge tree in question must be assigned the application type, "Document Generator", in the technical tree properties and text modules should be assigned to the node of the tree.

NOTE: If the Dossier Module is installed on your server then you have additional features available for the generation of documents. The methods described below only apply if you are **not** using the Dossier Module. The methods for the generation of documents when using the Dossier Module are described further on in the User's Manual.

NOTE: The generation of documents occurs in Microsoft Word; therefore you must have Microsoft Word installed on your PC. The data exchange is controlled by ActiveX; therefore document generation is only possible when using Internet Explorer.

7.1. System Requirements

In order to use the document generator, the following system requirements must be met by the author and the user:

- **Operating system: MS Windows 2000, Microsoft XP or Microsoft Vista**
- **Installed Internet Explorer version 6 or later**
- **Installed Flash Player version 8 or later** (the standard *Flash Player* software can be downloaded free of charge from the following address: "*http://www.adobe.com/shockwave/download/download.cgi?P1_Prod_Version=ShockwaveFlash&promoid=BIOW"*)
- **Activated JavaScript** (The use of JavaScript must be enabled in your browser.)
- **Accessing the LOGOS server** (Your workstation must be able to access the computer that the LOGOS server is installed on via http. **Note:** The LOGOS server computer may also be the workstation)
- **Customized security settings** (The address / URL of your LOGOS server should be entered as a Trusted site in Internet Explorer. Please refer below for further details)
- **Installed Microsoft Office version 2000 or later**

In order to ensure that information can be exchanged between the knowledge tree that is displayed in Internet Explorer and Microsoft Word, it is necessary to configure the address of the computer that the LOGOS server is installed on, as a "Trusted site" in Internet Explorer for each Workstation. In order to do so, proceed as follows:

1. Open Internet Explorer.
2. Open the "*Tools*" menu and click on "*Internet Options*".
3. Click on the "*Security*" tab.
4. Click on the "*Trusted sites*" icon.
5. Click on the "*Sites*" button.
6. Enter the address of the computer that the LOGOS server is installed on in the line labelled "Add this Web site to the zone" and add the extension "/knowledgetools/dms". After doing so, your address should read as follows: "http://address_of_the_server/knowledgetools/dms".
7. Click on the [OK] button.
8. Close the window by clicking on the [OK] button.

NOTE: If you are using Internet Explorer 7, make sure that the security level for the "Trusted sites" is set at "Low".

NOTE: If the Dossier Module is installed on your LOGOS server, then you must create process and layout templates in order create documents with specified layouts. In addition, it is necessary to install the "*ktools.dot*" template in the user template directory of each workstation. Further information on this topic is available in the chapter on the "The Dossier Module".

7.1.1. Using the Document Generator

When using this application type it is possible to assign two text modules to each node of the tree in the Structure Editor using the logical colour marking system; one text module for cases where the node in question has been marked as "True" (green) and one text module for cases where the node has been marked as "False" (red).

In addition, it is also possible to assign input fields to these text modules, where the user can later enter certain process-related data when analysing the respective node.

The actual generation of documents occurs in normal mode – document generation is not possible in structure editor mode.

The document "builds" itself up dynamically from the individual text modules during the colour marking in normal mode. The document includes all the nodes that have been marked either red or green and possess the respective text module. Texts that are attached to nodes that have not been marked or marked as "Not Checked" are not

included in the document. The sequence in which the text modules are included in the document is fixed.

Therefore, it is important to visualize the way in which the text modules are arranged.

There are three basic rules:

1. The text modules of the parent nodes are inserted before the text modules of the respective child nodes.
2. The text modules of the child nodes are inserted from top to bottom in the document.
3. The text modules of a tree section are only inserted into the document after the text modules of the previous tree section have been inserted.

However, you have the option to change the order of the text modules. Further information on this topic is available later on in the "Document Generation" chapter.

7.1.2. Preparing the Knowledge Tree for Document Generation

Before it is possible to generate documents from a knowledgeTool, it is first necessary to create the required text modules in the Structure Editor.

1. Open the tree that you want to edit in editor mode. Please note that you must possess write access to the tree.
2. Make sure that the tree is assigned the application type, "Document Generator", in the "Technical Tree Properties" window.
3. Select the node where you want to attach one or more text modules to by clicking on it once with the left mouse button.
4. At the bottom of the screen, you will see two tabs labelled "Text Module (True)" and "Text Module (False)". Select which of the two text modules you want to edit by clicking on it with the mouse and then click on the icon at the top right-hand corner of the respective tab.
5. Enter the required text and click on [Save].

7.1.3. Integrating Input Fields

The user has the option to define input fields for every single node and to integrate these in the text modules. The data which is later entered into the input fields by users is then included in the generated document. Please note that the input fields are only available at the node where they have been created and not throughout the entire tree.

The integration of input fields occurs in two steps:

1. Define the input fields that should generally be available at a node.
2. Integrate one or more of these input fields in a text module of the node.

NOTE: The creation of input fields is described in chapter 7.2.

In order to integrate an input field that has already been created in a text module, proceed as follows:

1. Open the tree that you want to edit and select the node that contains the text modules where you want to integrate the input fields.
2. Select which of the two text modules you want to edit by clicking on it with the mouse and then click on the icon at the top right-hand corner of the respective tab.
3. You can now enter the text of your choice. However, this step is optional and the input fields can also be used without any additional text.
4. Click on the position in the text where you want to insert the input field with the mouse and click on the icon in the toolbar.
5. The names (labels) of all the input fields that are available for the selected node, will now be displayed in the selection list that appears. In addition, the master data fields of your dossiers will also be displayed; you have the option to integrate these into the text as well (also refer to chapter 8.1.5 below).
6. Select one of the input fields by clicking on it with the mouse. The input field will now be integrated into the text.
7. Click on [Save] to save the text module.

Of course, it is also possible to insert more than one input field into a text module. In order to do so, simply repeat steps 4 and 5.

Nodes that have input fields for document generation in their text modules are indicated by the presence of a small blue icon at the bottom right-hand corner of the node. If you move the mouse pointer over this icon, then the title of the input field will be displayed. In addition, the title will be coloured green or red to display which text module the field belongs to (green = "True" or red = "False").

7.1.4. Using the Sidebar

The input fields that exist for a node (see chapter 7.2 below) are displayed in a sidebar on the right-hand side of the screen when in normal mode. This occurs as soon as the fields have been activated by assigning the corresponding colour markings.

The sidebar opens automatically as soon as the node in question is marked as "True" or "False". Of course, it is also possible to open the sidebar yourself by clicking on the tab on the left-hand side of the sidebar.

The users can now enter their data in the corresponding fields and confirm the entries by clicking on the [Save] button.

The sidebar also displays the fields that require an entry due to the automatic logical colour marking system. By clicking on "Show Node" with the mouse, the corresponding node, with the respective input field, is centred on the screen.

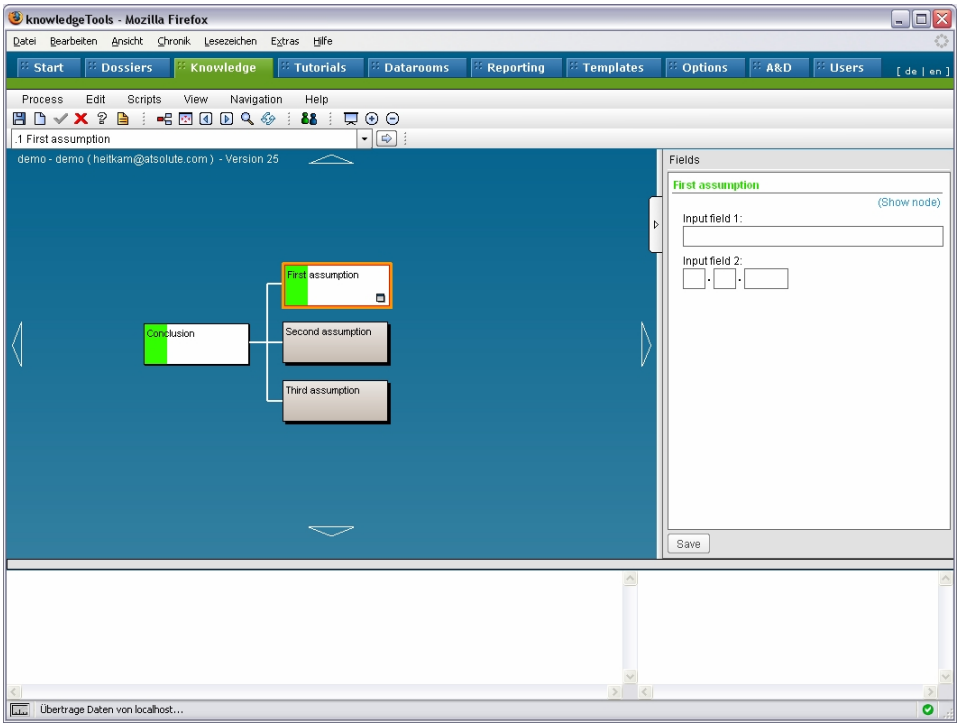


Fig.: The sidebar displays all of the activated input fields of a path

7.2. Using Input Fields

Input fields can be used in the generation of documents, as described above, but they can also be used for the collection of data, e.g. for the purpose of statistical analysis. In this case it is possible to assign input fields to each node; the input fields are only visible to the user when analysing a process; the data that is entered in the fields is saved in the respective process.

The data that is entered in the input fields is only used for document generation if the input fields are integrated in text modules as described above.

Each input field has an individual name (label) by which it can later be identified. As the author, you can determine:

- the type of entry that can be made in the fields (e.g. only integers or dates)
- the conditions under which the input field becomes visible (i.e. when the corresponding node is marked as either "True" or "False", or if one of the two markings has been set at all.

Please note that input fields can always only belong to one specific node and do not apply for the entire tree.

7.2.1. Creating Input Fields

The following types of input fields are available:

- **Character String** – any characters (letters, numbers) can be entered in the input field
- **Integer** – only integers can be entered in the input field (only numbers without decimal points can be entered)
- **Floating Point Number** – numbers with decimal points can be entered in the input field
- **Shortlist** – users can select a value (text or number) from a list of predefined values.
- **Multi-Line Text** – contrary to the "Character String" field, where any character can be entered in the input field in a single line, in this case, any character can be entered in a single or multi-line input field
- **Boolean Value –** instead of an alphanumeric input field, a check box is created with the "Yes" or "No" value
- **Date –** only a date can be entered in the input field
- **Time –** only a time can be entered in the input field

In order to create an input field, proceed as follows:

1. Select the node that you want to attach one or more input fields to by clicking on it once in editor mode.
2. Open the "Edit" menu and click on "Edit Input Fields". Alternatively, you can also click on the icon in the toolbar. The "Input Fields" window will now open.
3. Enter a name for the input field that you want to create in the input field labelled "Label". (This name will later be displayed for users next to the input field.)
4. Using the "Type" shortlist, select the type of data that you want to allow when data is entered (see above).
5. Select the conditions under which the input field should be visible from the "Conditions" selection list. The following options are available: "True", "False" or "Marked" (therefore either "True" or "False").
6. Click on [Save Changes] to create the field or click [New Field] to create another input field.

One special feature is the "Shortlist" input field, in which, the user has the option to create a shortlist with specified values. In this case, the subsequent user can select a value from a list of predefined values, instead of entering a value.

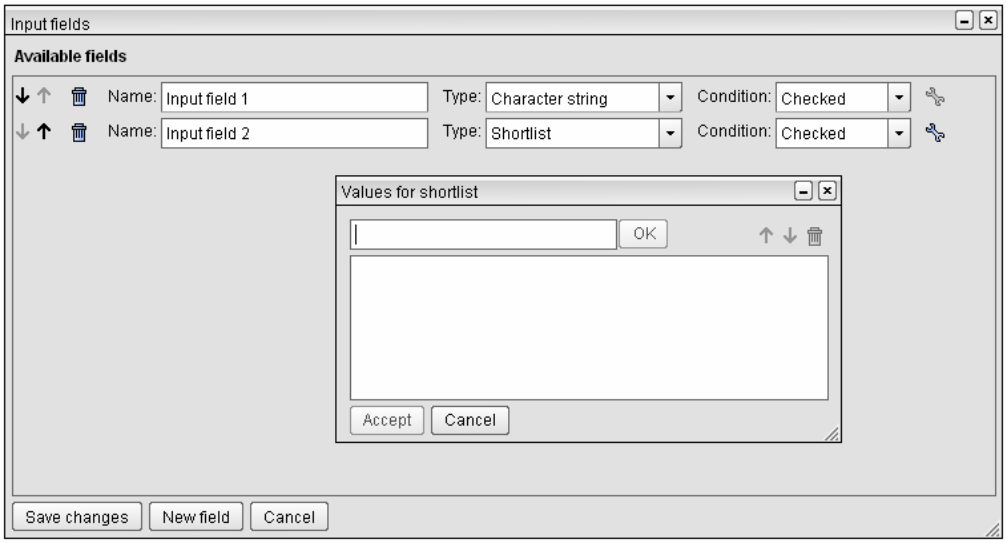


Fig.: The "Input Fields" dialog box for the creation of a Shortlist

In order to create this type of shortlist, proceed as follows:

1. Enter a field name in the input field labelled "Label".
2. Select the option "Shortlist" under "Type".
3. Select when the field should be visible under "Conditions".
4. A blue wrench icon will now appear on the right-hand side. Click on the icon and a new window will open.
5. The values of the shortlist can be entered in this new window. Enter the first value in the input field on the left, next to the [OK] button.
6. Click on [OK] and the value will be displayed in the field below.
7. Enter the next value in the upper field and click on [OK] again.
8. In order to change the order of the values in the list, click on a value once with the left mouse button and it will be selected. By using the arrow keys on the keyboard, you can now move the value up or down in the list.
9. In order to delete a value from the list, select the required value, as described above, by clicking on it once with the mouse, and then click on the recycle bin icon.
10. Click on [Apply] to save the list and close the dialog box.

If you have created several input fields, you can change the order in which the fields are displayed by moving the fields up or down using the black arrow icons.

In order to delete an input field, simply click on the recycle bin icon in front of the name of the input field.

7.2.2. Editing Existing Input Fields

If a node has an input field, then this will be indicated by the presence of a blue icon at the bottom right-hand corner of the node.

If you move the mouse pointer over this icon, the labels of the existing input fields for the node will be displayed. In addition, the labels will be coloured as follows (see figure):

- green, if the input field has been assigned the condition "True"
- red, if the input field has been assigned the condition "False"
- black, if the input field has been assigned the condition "Marked"

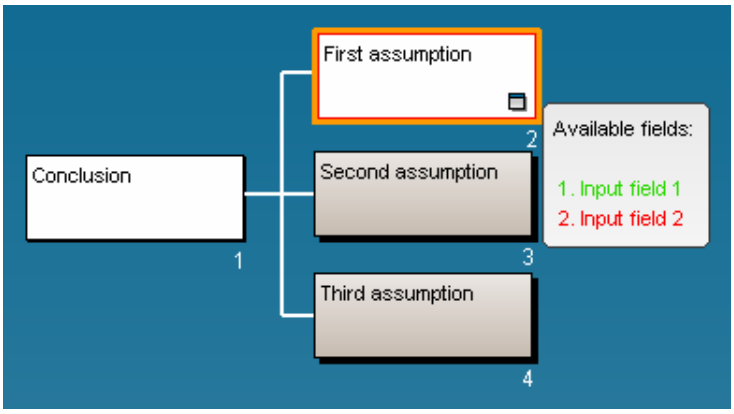


Fig.: A node with input fields

You can edit the existing input fields by clicking on the icon in the node when in editor mode. Alternatively, you can also open the "Edit" menu and select the "*Edit Input Fields*" option. The "Input Fields" window will now open and the existing fields will be displayed. In order to change the label, the type or the conditions of an existing field, simply use the corresponding input fields or Shortlists.
In order to delete an input field, click on the recycle bin icon on the left next to the label of the input field.
In order to change the order of the existing input fields, use the arrows.
Click on [Save Changes] to save your changes.

7.3. Document Generation

The generation of documents occurs in normal mode (not in structure editor mode) on the basis of assigning a colour marking, i.e. a process. In order to create a document, proceed as follows:

1. Open a knowledge tree that has been prepared for document creation in normal mode.
2. Assign the colour marking, i.e. mark the node as "True" or "False" depending on your working situation. A sidebar will open on the right-hand side of the screen, in which the text modules that are associated with the node, where the colour marking has been assigned, will be displayed. This also serves as a preview of the structure of the document that is to be created.
3. Open the "Process" menu and click on "Create Document".

4. Depending on the security settings that you have configured, a pop-up window will now appear with the question, "An ActiveX control element on this page is possibly in conflict with other elements on this page. Do you want to allow this?" Click on [Yes] in the window.
5. Microsoft Word will now open and the document will be displayed. You can now edit the document according to your requirements, save it locally or print it in MS Word.

Alternatively, you can also create documents on the basis of existing processes. In order to do so, open an existing process (that belongs to a document generator knowledge tree) and then follow the steps described above from step 3 to step 5.

7.3.1. Editing Generated Documents

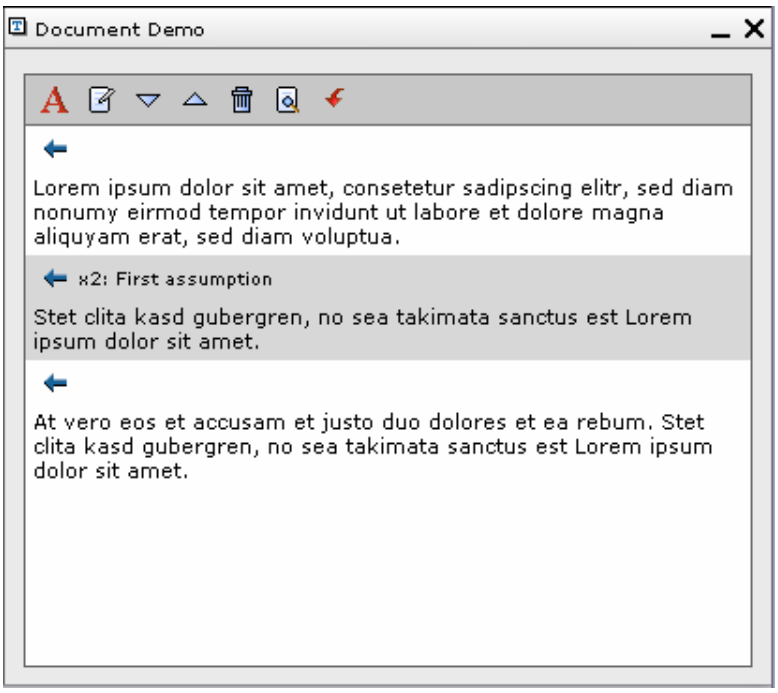
Generated documents can be edited in the following ways prior to exporting them to Microsoft Word.
The individual text modules of the document can be

- edited with regard to content
- deleted
- moved

or new own text modules can be added.

NOTE: Changes that are made to text modules are saved in the updated process and can therefore be accessed at any time. However, the changes do *not* have an effect on the original text modules of the knowledge tree.

As described above, the text modules of nodes, which have been marked as "True" or "False" during the assigning of the colour marking, are added and listed under each other in the sidebar on the right-hand side of the screen.


Document Demo
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x2: First assumption
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At vero eos et accusam et justo duo dolores et ea rebum. Stet clita kasd gubergren, no sea takimata sanctus est Lorem ipsum dolor sit amet.

Fig.: The dynamically created document in the sidebar

A blue arrow is displayed above every text module. If you touch this arrow with the mouse pointer, then the node that the text module belongs to is displayed. The display occurs in the following form: [*Node ID: Node Title*]. If you click on the arrow, then the corresponding node is accessed on the left in the knowledge tree.

Moving Text Modules

Text modules can be moved up or down by one position within the document.

In order to do so, select the text module that you want to move by clicking on it with the mouse (the text module will then be marked in grey) and then click on the or icons to move the text block up or down.

Editing Text Modules

Select the text module that you want to edit by clicking on it once with the mouse and then click on the icon. An editing window will open. Edit the text as required and then click on the [Save] to apply your changes. Please note that these changes will only have an effect on the text module in the document draft in the sidebar. The original text of the text module in the knowledge tree will remain unchanged.

Text modules that have been edited in this way will be marked accordingly. The note "*adapted*" will be displayed on the right of the icon on the first line of the text module.

You also have the option to undo changes to the text modules. In order to do so, select the text module in question by clicking on it with the mouse and then click on the icon in the sidebar.
The "Versions" window will now open on the left-hand side of the screen. All the edited versions of the text module will be displayed in the window. Select an edited version by clicking on the button labelled [Use This Version]. This version will now again be displayed in the sidebar on the right-hand side of the screen.

Inserting New Text Modules

In addition to the text modules that have been integrated in the document as a result of the colour marking being assigned, you can also insert your own text modules.

1. In order to do so, select the text module in the sidebar under which the new text module should be inserted and click on the icon.
2. A new empty line will appear with the icon at the beginning of the line. Select the line by clicking on it with the mouse and then click on the icon to enter the actual text.
3. The text editor will now open on the left. Enter a text and click on [Save] to save your entries.

Please note that text modules that are added in this way are not linked to a node of the knowledge tree.

Deleting Text Modules

Select the text module that you want to delete by clicking on it with the mouse and then click on the icon. Please note that the text module is only deleted from the document draft in the sidebar. The original text module remains in the knowledge tree.
If a text module has been deleted, then an empty line is displayed instead of the text module with the icon at the front of the line. The note "*removed*" will be displayed on the right-hand side of the icon. In order to recover the deleted text module, first click once on the corresponding line and then click on the icon. The "Versions" window will now open on the left-hand side. Select one of the displayed versions of the text module by clicking on the button labelled [Use This Version]. The text module will now again be displayed on the right-hand side.

Show Preview

Click on the icon to show the preview of the document without separated text modules and icons in the text.

7.4. Creating a Table of Contents

The user has the option to publish the open knowledgeTool in text form (with or without the additional information). This is done by using the "Create Table of Contents" function. The table of contents can be created as required

- in "HTML" format
- in "RTF" format (for further editing, e.g. in Microsoft Word)
- in "PDF" format.

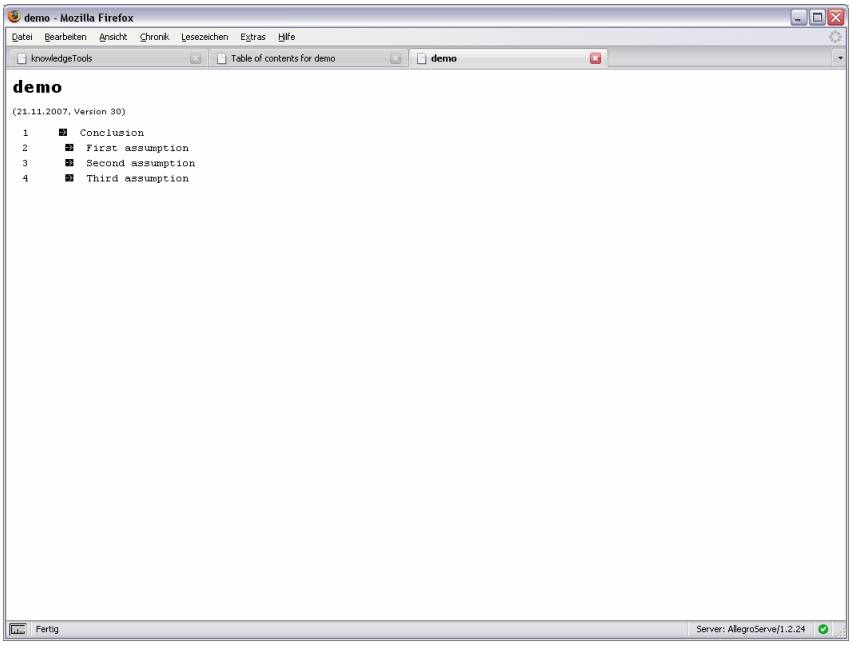

Fig.: An example of a table of contents

The user can create a table of contents for the entire tree or limit the table of contents by specifying that it should be created from the selected node onwards. In this case, you must click on the node that you want the creation of the table of contents to start at, before creating the table of contents.

In order to create a table of contents, proceed as follows:

1. Open the "Navigation" menu in the tree and click on "Create Table of Contents".
2. Select the settings that you want to create the table of contents with in the window that appears (see below for further details).

3. Click on the [OK] button to start creating the table of contents. Please note that the creation may take longer depending on the size of the tree and the selected settings.

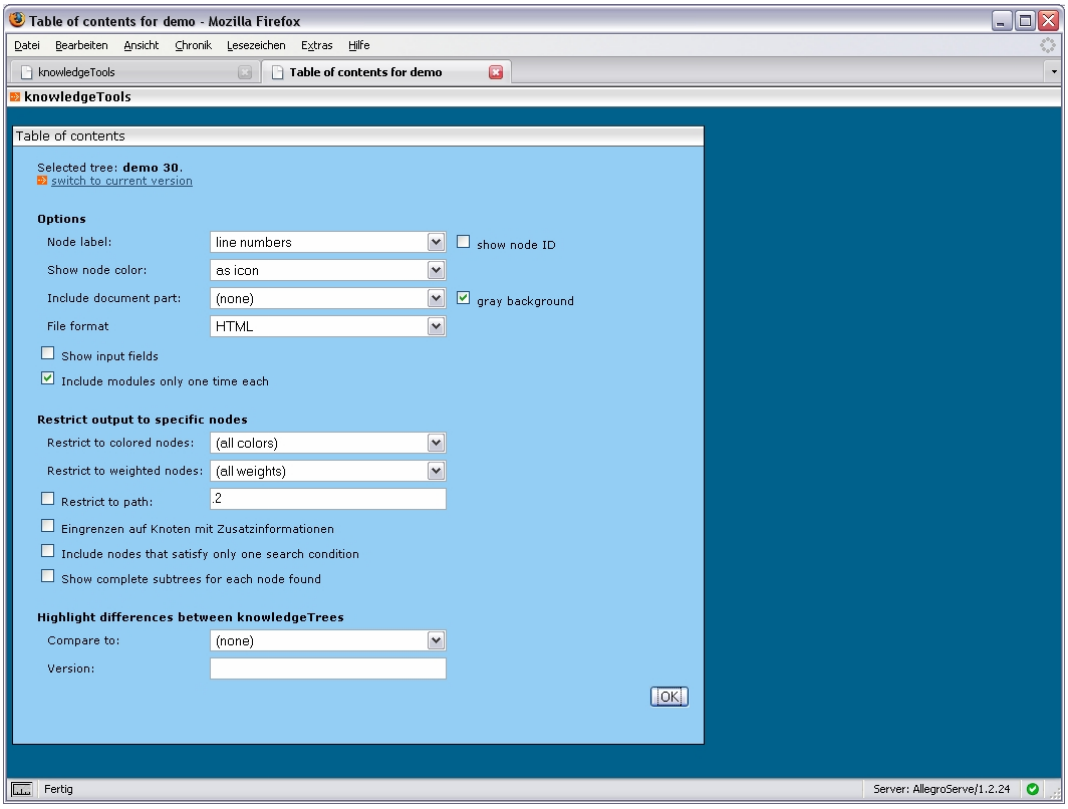

Fig.: The settings for the creation of a table of contents

The following configuration settings are available for the creation of a table of contents:

Node Label

Using the drop-down list, choose whether:

- the individual lines of the table of contents are numbered consecutively
- the technical path of each node is displayed in front of the respective node

Show Node ID

Apply a tick to the check box if you want the Node ID to be displayed in front of the name of the node.

Show Node Colour

This option is only relevant if the nodes of the tree have been assigned colour markings. If applicable, use the drop-down list to select one of the following options:

- the colour marking that has been assigned to the node should be displayed as a correspondingly coloured icon in front of the name of the node
- the name of the node should be coloured in accordance with the marking
- the text should be displayed with a correspondingly coloured background

Include Document Part

The user not only has the option to display the node title in the table of contents, but also the additional information that has been assigned to the node. In the default version, no additional information is integrated; however, by using the drop-down list, the user can select the additional information that is to be integrated.

Grey Background

Apply a tick to this check box if you want the additional information in the table of contents to be shaded grey for better distinction.

File Format

The user can determine whether the table of contents should be created in "HTML" format, as an "RTF" file that can be edited in, e.g. MS Word or as a "PDF" document.

Include Modules Only One Time Each

Nodes and tree sections can appear more than once in a tree (modules). If you want modules that exist more than once, to only be displayed once in the table of contents, then apply a tick to this check box.

Restrict To Colored Nodes

The user can specify that only certain colour markings should be included in the table of contents. Use the drop-down list to select the node colours that should be included in the table of contents.

Restrict to Weighted Nodes

The user can specify that only nodes with a certain weighting should be included in the table of contents. Use the drop-down list to select the weighting that should be included in the table of contents.

Restrict to Path

The table of contents can be created from the first node of a tree (start node) or it can start from any other selected node.

If you select the second option, then apply a tick to the check box labelled "Limit to Path" and enter the technical path of the node from which you want the creation of the table of contents to start in the field on the right, next to it.

NOTE: If you select a node other than the start node of the tree, and you then access the dialog for creating a table of contents, the technical path of the selected node will automatically be entered in the field.

Restrict To Nodes With Supplementary Information

With this option, you can determine that only those nodes with additional information are included in the table of contents.

Include Nodes That Satisfy Only One Search Condition

If you have selected all or several of the above options for the table of contents, then you can use this option to determine that nodes, which only fulfil one of the conditions, should also be included in the table of contents.

8. The Legal Database

If you possess the corresponding licence on your server, then you will also have access to the Legal Database. By using the web-based editor, users can also upload laws and decisions to the database themselves.

The additional information that is contained in knowledgeTools, i.e. explanatory texts, detailed texts, practice texts, etc. is automatically linked to the integrated Legal Database, in so far as a law or decision is cited in these texts. The laws or decisions in the texts are displayed as links, with a corresponding icon, in an abbreviated form in the "Library" window. This applies under the condition that the law or decision in question is included in the Legal Database. This database contains the full texts of the linked laws and decisions.

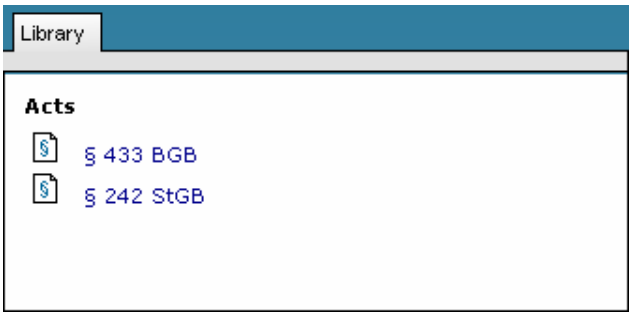

Fig.: The "Library" window displaying links to laws

The display of laws and decisions depends on the configuration of the client and the contents of the respective displayed knowledgeTools.

8.1. Viewing Laws

The user has the option to search the Legal Database for a specific law and access it in full text or to access a specific regulation from a knowledgeTool.

8.1.1. Viewing Laws in the Database

Click on the "**A&D**" tab at the top of the screen and then on the button labelled [Show all acts]. An alphabetical list of all the laws that exist on the server will now be displayed. Click on the abbreviation of the law to access the law. The content of the law will now be displayed as an expandable, hierarchical document structure on the left-hand side of the screen. Those elements that have sub-elements have a "plus" sign in front of them.

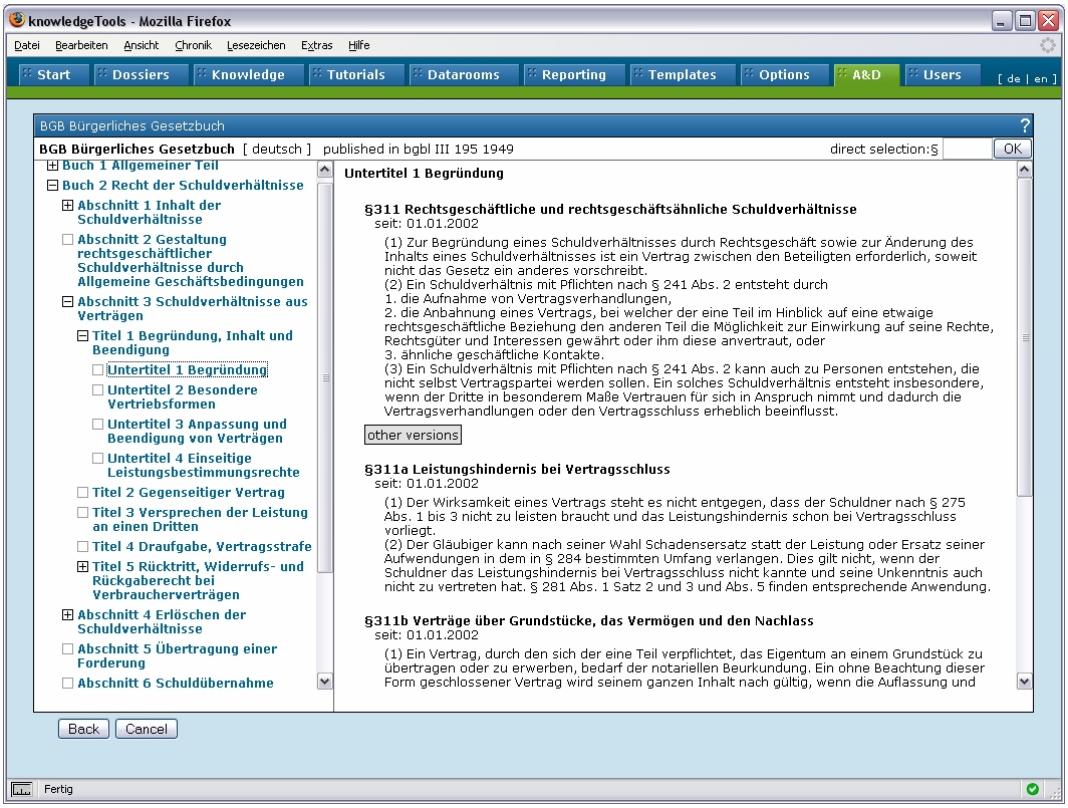
knowledgeTools - Mozilla Firefox
Datei Bearbeiten Ansicht Chronik Lesezeichen Extras Hilfe
Start Dossiers Knowledge Tutorials Datarooms Reporting Templates Options A&D Users [de | en]
BGB Bürgerliches Gesetzbuch
BGB Bürgerliches Gesetzbuch [deutsch] published in bgbl III 195 1949
direct selection:§ OK
Buch 1 Allgemeiner Teil
Buch 2 Recht der Schuldverhältnisse
Abschnitt 1 Inhalt der Schuldverhältnisse
Abschnitt 2 Gestaltung rechtsgeschäftlicher Schuldverhältnisse durch Allgemeine Geschäftsbedingungen
Abschnitt 3 Schuldverhältnisse aus Verträgen
Titel 1 Begründung, Inhalt und Beendigung
Untertitel 1 Begründung
Untertitel 2 Besondere Vertriebsformen
Untertitel 3 Anpassung und Beendigung von Verträgen
Untertitel 4 Einseitige Leistungsbestimmungsrechte
Titel 2 Gegenseitiger Vertrag
Titel 3 Versprechen der Leistung an einen Dritten
Titel 4 Draufgabe, Vertragsstrafe
Titel 5 Rücktritt, Widerrufs- und Rückgaberecht bei Verbraucherverträgen
Abschnitt 4 Erlöschen der Schuldverhältnisse
Abschnitt 5 Übertragung einer Forderung
Abschnitt 6 Schuldübernahme
Untertitel 1 Begründung
§311 Rechtsgeschäftliche und rechtsgeschäftsähnliche Schuldverhältnisse
seit: 01.01.2002
(1) Zur Begründung eines Schuldverhältnisses durch Rechtsgeschäft sowie zur Änderung des Inhalts eines Schuldverhältnisses ist ein Vertrag zwischen den Beteiligten erforderlich, soweit nicht das Gesetz ein anderes vorschreibt.
(2) Ein Schuldverhältnis mit Pflichten nach § 241 Abs. 2 entsteht durch
1. die Aufnahme von Vertragsverhandlungen,
2. die Anbahnung eines Vertrags, bei welcher der eine Teil im Hinblick auf eine etwaige rechtsgeschäftliche Beziehung den anderen Teil die Möglichkeit zur Einwirkung auf seine Rechte, Rechtsgüter und Interessen gewährt oder ihm diese anvertraut, oder
3. ähnliche geschäftliche Kontakte.
(3) Ein Schuldverhältnis mit Pflichten nach § 241 Abs. 2 kann auch zu Personen entstehen, die nicht selbst Vertragspartei werden sollen. Ein solches Schuldverhältnis entsteht insbesondere, wenn der Dritte in besonderem Maße Vertrauen für sich in Anspruch nimmt und dadurch die Vertragsverhandlungen oder den Vertragsschluss erheblich beeinflusst.
other versions
§311a Leistungshindernis bei Vertragsschluss
seit: 01.01.2002
(1) Der Wirksamkeit eines Vertrags steht es nicht entgegen, dass der Schuldner nach § 275 Abs. 1 bis 3 nicht zu leisten braucht und das Leistungshindernis schon bei Vertragsschluss vorliegt.
(2) Der Gläubiger kann nach seiner Wahl Schadensersatz statt der Leistung oder Ersatz seiner Aufwendungen in dem in § 284 bestimmten Umfang verlangen. Dies gilt nicht, wenn der Schuldner das Leistungshindernis bei Vertragsschluss nicht kannte und seine Unkenntnis auch nicht zu vertreten hat. § 281 Abs. 1 Satz 2 und 3 und Abs. 5 finden entsprechende Anwendung.
§311b Verträge über Grundstücke, das Vermögen und den Nachlass
seit: 01.01.2002
(1) Ein Vertrag, durch den sich der eine Teil verpflichtet, das Eigentum an einem Grundstück zu übertragen oder zu erwerben, bedarf der notariellen Beurkundung. Ein ohne Beachtung dieser Form geschlossener Vertrag wird seinem ganzen Inhalt nach gültig, wenn die Auflassung und
Back Cancel
Fertig

Fig.: The display of a law in the Legal Database

Click on the "plus" sign to open the hierarchy. Elements that have a text will be highlighted in orange when you move over them with the mouse pointer. Click on these elements to display the corresponding text on the right-hand side of the screen.

If the Legal Database contains earlier versions of the law that were valid in the past, then there will be a button labelled [Other Versions] displayed under the text of the law. By clicking on this button, the versions that were previously applicable, as well as the corresponding period when the earlier versions were valid, will be displayed.

The user can search the Legal Database for specific individual regulations within the currently displayed law.

The "*Direct Selection*" input field is displayed at the top right-hand corner of the screen. Enter the regulation that you want to search for in the input field and confirm the entry by clicking on the [OK] button. The search result will then be displayed in the same window.

8.1.2. Accessing Laws in a knowledgeTool

Click on the corresponding entry in order to view a law that is listed in the "Library" window. The currently open tree will now be minimized and the law will be displayed. Click on the minimized display of the tree to return to the knowledge tree.

8.2. Viewing Decisions

The user has the option to access the decisions that are contained in the Legal Database either directly, in the same way as a law, or to access them from a knowledgeTool.

8.2.1. Viewing Decisions in the Database

Click on the "**A&D**" tab at the top of the screen and then on the selection list labelled "Please Select Court". Select a court from the list in order to display all the decisions that exist on the server from the court in question and then click on the [Display] button. If there are decisions from the selected court, then these will be sorted according to file numbers. Click on the file number of a decision to access the text of the corresponding decision.

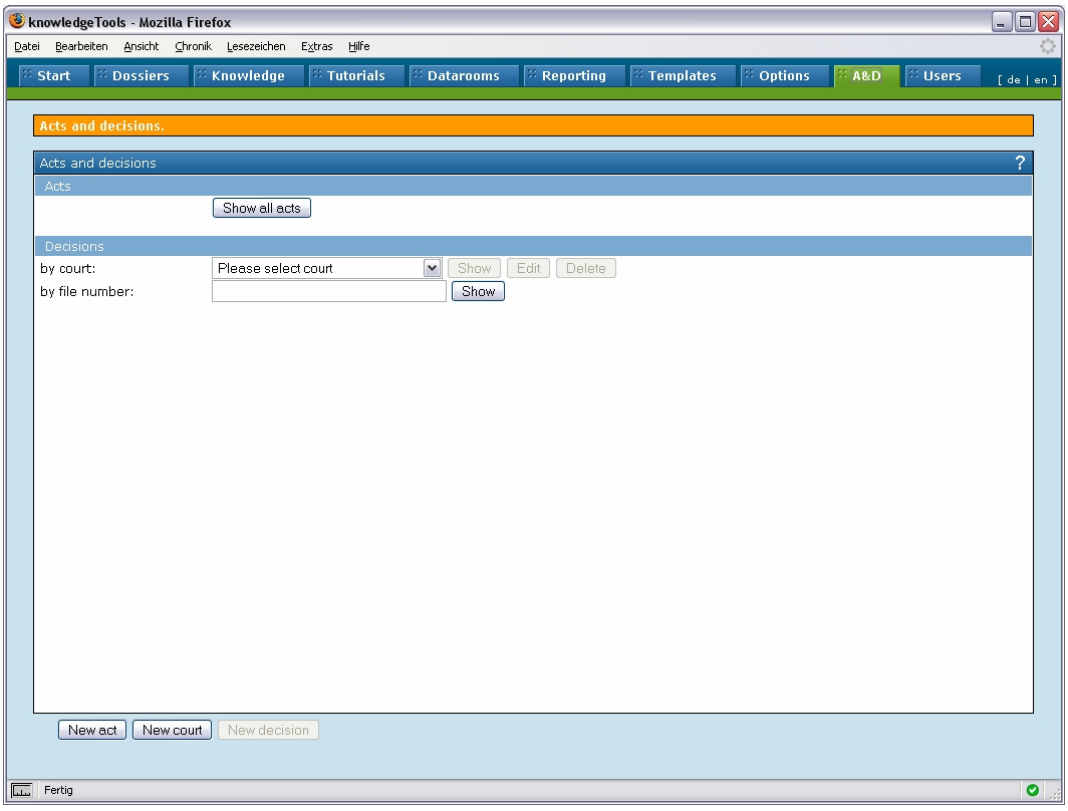

Fig.: The start page of the Legal Database

Alternatively, you can also search for a decision directly. In order to do so, enter the file number of the decision in the input field under the selection list and then click on the [Display] button on the right, next to the input field.

A decision in the Legal Database may contain the following elements:

- Keywords
- Norms
- Official Headnote

- Editorial Headnote
- Operative Provisions
- Facts of the Case
- Reasons for the Decision
- Sources
- Lower / Higher Instance
- Other Decisions.

The user has the option to move from one element to the next within the decision by using the "Go To" selection list at the top, right-hand corner of the screen. Only those elements that actually exist in the decision are displayed in the selection list.

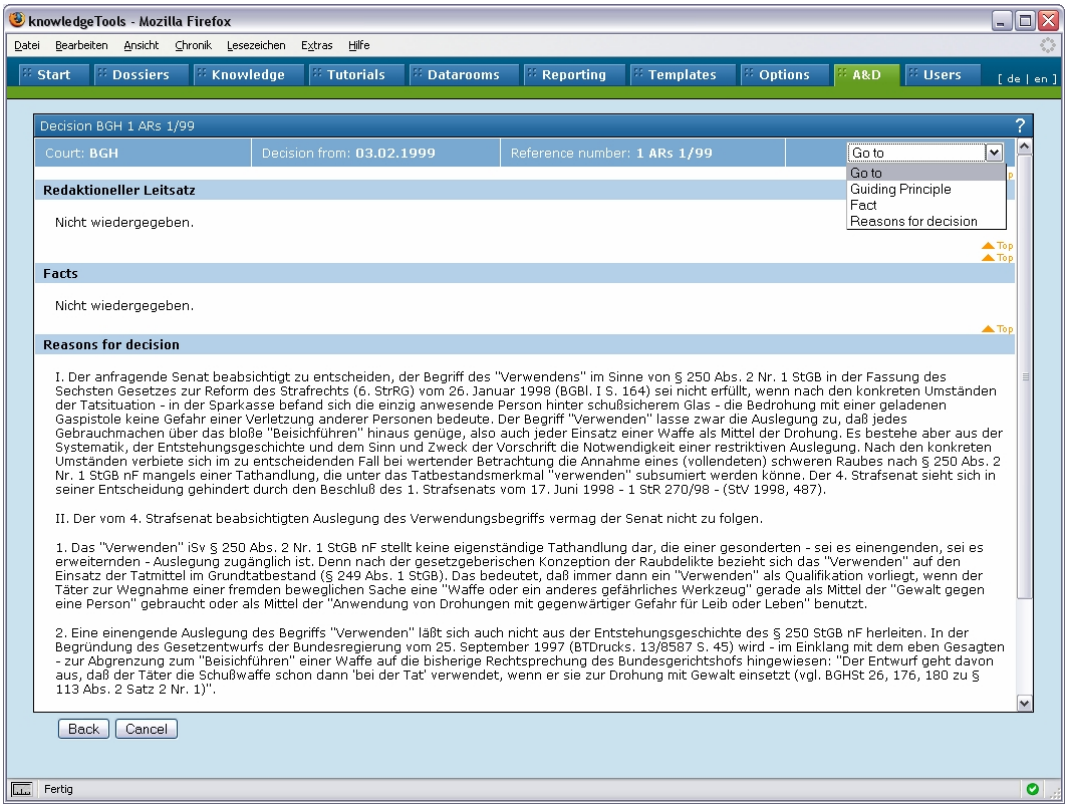
knowledgeTools - Mozilla Firefox
Datei Bearbeiten Ansicht Chronik Lesezeichen Extras Hilfe
Start Dossiers Knowledge Tutorials Datarooms Reporting Templates Options A&D Users [de | en]
Decision BGH 1 ARs 1/99
Court: BGH
Decision from: 03.02.1999
Reference number: 1 ARs 1/99
Go to
Go to
Guiding Principle
Fact
Reasons for decision
Redaktioneller Leitsatz
Nicht wiedergegeben.
Facts
Nicht wiedergegeben.
Reasons for decision
I. Der anfragende Senat beabsichtigt zu entscheiden, der Begriff des "Verwendens" im Sinne von § 250 Abs. 2 Nr. 1 StGB in der Fassung des Sechsten Gesetzes zur Reform des Strafrechts (6. StrRG) vom 26. Januar 1998 (BGBl. I S. 164) sei nicht erfüllt, wenn nach den konkreten Umständen der Tatsituation - in der Sparkasse befand sich die einzig anwesende Person hinter schußsicherem Glas - die Bedrohung mit einer geladenen Gaspistole keine Gefahr einer Verletzung anderer Personen bedeute. Der Begriff "Verwenden" lasse zwar die Auslegung zu, daß jedes Gebrauchmachen über das bloße "Beisichführen" hinaus genüge, also auch jeder Einsatz einer Waffe als Mittel der Drohung. Es bestehe aber aus der Systematik, der Entstehungsgeschichte und dem Sinn und Zweck der Vorschrift die Notwendigkeit einer restriktiven Auslegung. Nach den konkreten Umständen verbiete sich im zu entscheidenden Fall bei wertender Betrachtung die Annahme eines (vollendeten) schweren Raubes nach § 250 Abs. 2 Nr. 1 StGB nF mangels einer Tathandlung, die unter das Tatbestandsmerkmal "verwenden" subsumiert werden könne. Der 4. Strafsenat sieht sich in seiner Entscheidung gehindert durch den Beschluß des 1. Strafsenats vom 17. Juni 1998 - 1 StR 270/98 - (StV 1998, 487).
II. Der vom 4. Strafsenat beabsichtigten Auslegung des Verwendungsbegriffs vermag der Senat nicht zu folgen.
1. Das "Verwenden" iSv § 250 Abs. 2 Nr. 1 StGB nF stellt keine eigenständige Tathandlung dar, die einer gesonderten - sei es einengenden, sei es erweiternden - Auslegung zugänglich ist. Denn nach der gesetzgeberischen Konzeption der Raubdelikte bezieht sich das "Verwenden" auf den Einsatz der Tatmittel im Grundtatbestand (§ 249 Abs. 1 StGB). Das bedeutet, daß immer dann ein "Verwenden" als Qualifikation vorliegt, wenn der Täter zur Wegnahme einer fremden beweglichen Sache eine "Waffe oder ein anderes gefährliches Werkzeug" gerade als Mittel der "Gewalt gegen eine Person" gebraucht oder als Mittel der "Anwendung von Drohungen mit gegenwärtiger Gefahr für Leib oder Leben" benutzt.
2. Eine einengende Auslegung des Begriffs "Verwenden" läßt sich auch nicht aus der Entstehungsgeschichte des § 250 StGB nF herleiten. In der Begründung des Gesetzentwurfs der Bundesregierung vom 25. September 1997 (BTDrucks. 13/8587 S. 45) wird - im Einklang mit dem eben Gesagten - zur Abgrenzung zum "Beisichführen" einer Waffe auf die bisherige Rechtsprechung des Bundesgerichtshofs hingewiesen: "Der Entwurf geht davon aus, daß der Täter die Schußwaffe schon dann 'bei der Tat' verwendet, wenn er sie zur Drohung mit Gewalt einsetzt (vgl. BGHSt 26, 176, 180 zu § 113 Abs. 2 Satz 2 Nr. 1)".
Back
Cancel
Fertig

Fig.: The display of a decision in the Legal Database

8.2.2. Accessing Decisions in a knowledgeTool

Please click on the corresponding entry in order to view a decision that is listed in the "Library" window in full text. The currently open tree will now be minimized and the full text of the corresponding decision will be displayed. Click on the minimized display of the tree to return to the knowledge tree.

8.3. Entering Decisions in the Legal Database

Users can also enter laws and decisions in the database themselves. This can be done by using the web-based editor.

NOTE: In order to be able to edit laws and decisions, you must be authorized to do so as a "Laws and Decisions Editor" in the user administration.

8.3.1. Adding Courts

Decisions can only be added to a court that already exists in the database. Therefore, prior to entering a decision, you must either select an existing court or add a new court to the database.

8.3.2. Adding Decisions to an Existing Court

1. Start by clicking on the "**A&D**" tab at the top of the screen.
2. Please then click on the selection list labelled "Please Select Court" and select a court form the list.
3. Click on the [New Decision] button at the bottom of the screen.
4. Enter the file number of the decision in the corresponding input field of the window that appears.
5. Enter the date of the decision in the input field labelled "Date of Decision".
6. Click on the [Save] button and an input mask will open for the contents of the decision.
7. All the possible contents of the decision are listed in blue bars:
   - Keywords
   - Norms
   - Headnotes
   - Facts of the Case
   - Reasons for the Decision
   - Sources
   - Lower/Higher Instance

   The [Edit] button is displayed next to the description of each category. Click on the button in order to enter the content of the corresponding category.

   An editing window will open and the functions will vary depending on the type of content that you want to enter:

   - **Keywords** – Start by clicking on the button labelled [Add New Keyword] in the window. Enter the keyword in the input field that appears. In order to add another keyword, click on the button labelled [Add New Keyword] again and enter the new keyword in the next input field. You can also remove individual keywords by clicking on the [Remove] button under the corresponding keyword. Finish by clicking on the [Save] button to save your entries.

- **Norms** – Start by clicking on the button labelled [Add New Norm] in the window. Enter the section and the law separately in the respective input fields. In order to add another norm, click on the button labelled [Add New Norm] again and repeat the steps described above. You can also remove individual norms by clicking on the [Remove] button under the corresponding norm. Finish by clicking on the [Save] button to save your entries.
- **Official Headnote / Editorial Headnote / Operative Provisions / Facts of the Case / Reasons for the Decision** – In these windows, the user can enter the text directly into the input fields and then save the changes by clicking on [Save].
- **Sources** – Start by clicking on the button labelled [Add New Source] in the window. Enter the source in the input field that appears. In order to add another source, click on the button labelled [Add New Source] again and repeat the steps described above. You can also remove individual sources by clicking on the [Remove] button under the corresponding sources. Finish by clicking on the [Save] button to save your entries.
- **Lower / Higher Instances** – Start by clicking on the button labelled [Add New Instance] in the window. Select the corresponding court from the list of courts and then enter the file number of the decision in question. Repeat these steps in order to add more decisions. Finish by clicking on the [Save] button to save your entries.
- **Other Decisions** – Start by clicking on the button labelled [Add New Decision] in the window. Select the corresponding court from the list of courts and then enter the file number of the decision in question. Repeat these steps in order to add more decisions. Finish by clicking on the [Save] button to save your entries.

8.3.3. Adding Decisions to a New Court

1. Start by clicking on the "**A&D**" tab at the top of the screen.
2. Click on the [New Court] button at the bottom of the screen.
3. Enter the name of the court in the window that opens and then click on [Save].
4. Follow the steps described above in steps 2 to 7.

8.3.4. Editing Existing Decisions

1. Click on the "**A&D**" tab at the top of the screen.
2. Enter the file number of the decision that you want to edit in the input field labelled "By File Number" and then click on [Display]; or select the corresponding

court in the selection list above and then click on the [Display] button on the right, next to the selection list.

3. You will now access a list that, depending on the above described method, will either contain only the decision with the entered file number or all of the decisions by the court that has been selected in the selection list.
4. Click on the [Edit] button next to the decision that you want to edit and the decision will open.
5. Click on the [Edit] button next to the content that you want to edit.

8.4. Entering Laws in the Legal Database

The web-based editor can also be used to enter laws.

8.4.1. Entering New Laws

1. Click on the "**A&D**" tab at the top of the screen.
2. Click on the [New act] button at the bottom of the screen and an input mask will open where you will be able to enter the master data of the law:
   - Abbreviation
   - Title
   - Short Title
   - Language
   - Volume (in which the law was published)
   - Journal (in which the law was published)
   - Page (on which the law was published)
   - Year
   - Regulation Mark (this setting decides whether the individual regulations in the law begin with § or No.)

   The mandatory fields are marked by an asterisk (*). Please try and complete the input fields as fully as possible.

NOTE: The selection that you make for the abbreviation is the same one that will be used later for citing the laws in the knowledgeTools texts so that the corresponding law is correctly linked in the library.

3. Finish by clicking on the [Save] button to access the editor and enter the contents of the law.

Start by creating a hierarchical structure for the law. The editor is divided into two sections; the hierarchical structure of the law is displayed on the left-hand side of the

screen and the associated individual regulations are displayed on the right-hand side of the screen. The operation of the editor occurs using the icons at the top of the screen.

Creating and Editing the Hierarchical Structure

1. The first structure level of a newly created law already exists. Click on the first subheading and it will be marked by a blue bar.
2. Click on the icon to insert a new structure level. New structure levels are always added *under the respective selected structure level*.
3. Enter the title of the new structure level in the window that opens and then click on the [Save] button.

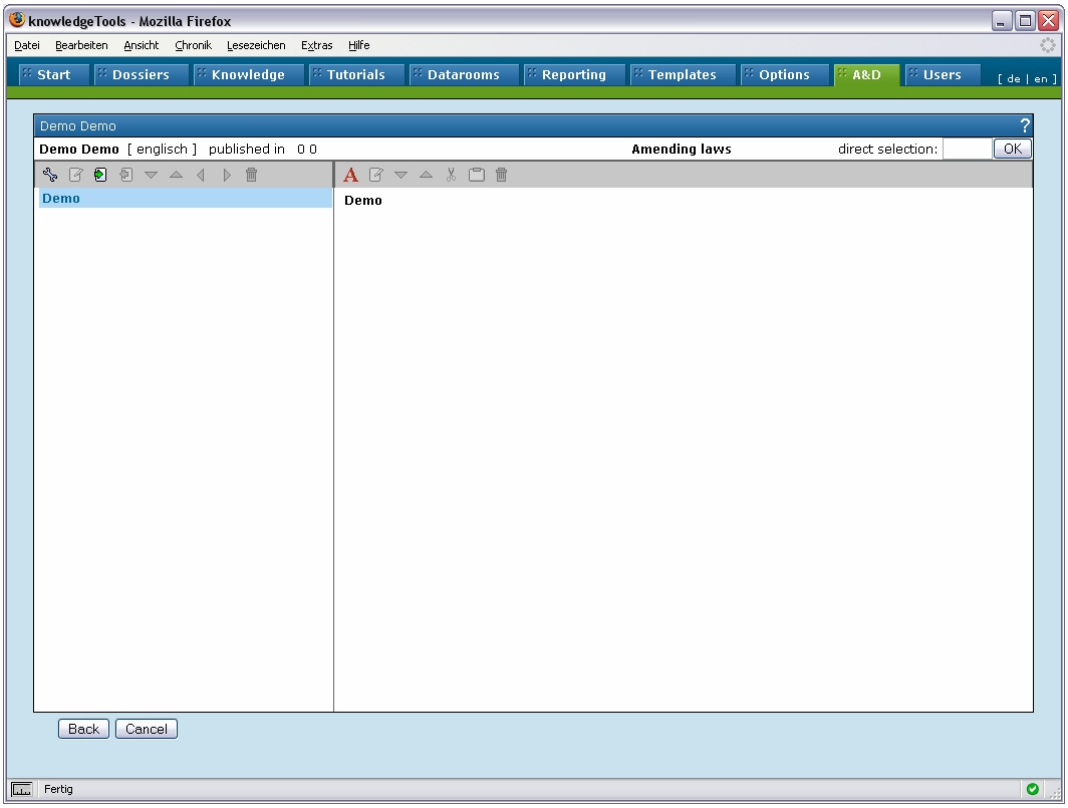

Fig.: The editor for entering the contents of laws

You can always rename, delete or move individual structure levels:

- In order to rename a structure level, select it by clicking on it with the mouse and then click on the icon.
- In order to delete a structure level, select it by clicking on it with the mouse and then click on the icon. If you do this, then the selected structure level *and all the contents* of the structure level will be deleted. However, structure levels and contents that are below the selected level will not be deleted.

- Click on the icon in order to delete the selected structure level with its contents, *as well as the subordinate* structure levels and their contents.
- Structure levels may be moved both vertically and horizontally. Click on the or icons in order to move a structure level one level up or down. Click on the or icons in order to move the selected level one level to the right or one level to the left.

Inserting Regulations

1. Select the structure level where you want to insert the regulation by clicking on it with the mouse.
2. Click on the icon at the top in the right-hand section of the screen and the "New Regulation" window will open.
3. Enter either the number of the regulation or an "A" to determine that the text is the preamble of the law, or an "E" to determine that it is the postscript.
4. Enter the title of the regulation and enter the date from which the regulation was valid under it. If you enter a regulation that is no longer valid, then you must also enter the date from which it was no longer valid under it.
5. Enter the text of the regulation and finish by clicking on [Save].

If there are already regulations on the selected structure level, then the new regulation will be inserted under the existing regulations. If, however, you would like to insert the new regulation above a certain regulation, then select the regulation in question by clicking on it with the mouse and then click on the icon.

Editing and Deleting Regulations

1. Select the regulation that you want to edit or delete by clicking on it with the mouse.
2. Click on the icon at the top in the right-hand section of the screen to delete the selected regulation.
3. Click on the icon at the top in the right-hand section of the screen to edit the selected regulation. A window will open and all the versions of the regulation (i.e. the versions of the regulation that were valid during different periods) will be displayed.
4. Click on the or icons in order to delete or edit the corresponding version.
5. If you click on the icon then the editing window will open.

6. Please make your changes and then finish by clicking on [Save].

NOTE: Decrees are entered in the database in the same way as laws.

Moving Regulations

Individual regulations may be moved within the same structure level or across several structure levels.

In order to move a regulation within the same structure level, select the corresponding regulations and move it up or down by using the or icons.

In order to move a regulation to another structure level, select the regulation and then click on the icon. Navigate to the structure level where you want to move the regulation in the left-hand section of the screen. Select the structure level by clicking on it with the mouse and then click on the icon. If there are already regulations on the structure level, then the new regulation will be inserted under the existing regulations. If you would like to insert the new regulation above a certain regulation, then select the regulation in question by clicking on it with the mouse and then click on the icon.

Entering Other Versions

If you want to enter different versions of a law that were valid during different periods, then please proceed as follows:

1. Select the corresponding regulation by clicking on it with the mouse.
2. Click on the icon at the top in the right-hand section of the screen.
3. Click on [New Text Version] in the editing window and complete the input fields. Please make sure to complete the two input fields that define the period of validity of the law.
4. Save your entries by clicking on [Save].

8.5. Managing Laws and Decisions – Exporting, Importing and Deleting

The user has the option to import and export laws and decisions to and from the Legal Database in the form of product files and to thus exchange the respective contents with the users of other LOGOS servers. In addition, you can also delete the existing laws and decisions in your Legal Database.

8.5.1. Exporting Laws

NOTE: You must possess the "Tree Admin" administrative access right in order to be able to perform this task.

1. Click on the "**Options**" tab.
2. Please then click on "Manage Laws and Decisions".
3. Click on the button labelled [Show all acts].
4. An alphabetically sorted list of all the laws that exist on your server will now be displayed. You now have the option to export one or more laws. In order to do so, click on the selection boxes in front of the names of the corresponding laws.
5. Next, click on the [Export] button and the task window will open. In this window, the export of the law will be displayed as a new task that is to be executed.
6. Please click on the icon to start the export process. If you want to delete the export task, then please click on the icon.
7. After the successful import, the message, "Completed Successfully", will be displayed in the task window. Click on the icon to download the exported law.
8. Please then click on the icon to remove the successfully completed task from the task window.

NOTE: Please note that if you export several laws at the same time, then they will be saved in a single file.

8.5.2. Deleting Laws

NOTE: You must possess the "Tree Admin" administrative access right in order to be able to perform this task.

1. Click on the "**Options**" tab.
2. Please then click on "Manage Laws and Decisions".
3. Click on the button labelled [Show all acts].
4. An alphabetically sorted list of all the laws that exist on your server will now be displayed. You now have the option to delete one or more laws. In order to do so, click on the selection boxes in front of the names of the corresponding laws.
5. Please then click on the [Delete] button at the bottom. The task window will open after the successful upload of the file. In this window, the deletion will be displayed as a new task that is to be executed.
6. Please click on the icon to start the delete process. If you want to cancel the delete process, then please click on the icon.
7. After the successful deletion, the message, "Completed Successfully", will be displayed in the task window.
8. Please then click on the icon to remove the successfully completed task from the task window.

8.5.3. Exporting Decisions

1. Click on the "**Options**" tab.
2. Please then click on "Manage Laws and Decisions".
3. Click on the selection list labelled "Please Select Court". Select the court from the selection list where the decision that you want to delete is saved. Alternatively, you can enter the file number of the decision that you want to delete in the input field that is below the selection list.
4. If you select a court by using the selection list, then all of the decisions from the court that exist in the database will be displayed. Select the decision that you want to delete by clicking on the selection box in front of the name of the decision. You can also select more than one decision in this way.
   If you enter a file number, then a decision will be displayed. Select the decision as described above.
5. Next, click on the [Export] button and the task window will open. In this window, the export of the law will be displayed as a new task that is to be executed.
6. Please click on the icon to start the export process. If you want to delete the import task, then please click on the icon.
7. After the successful export, the message, "Completed Successfully", will be displayed in the task window. Click on the icon to download the exported decision.
8. Please then click on the icon to remove the successfully completed task from the task window.

8.5.4. Deleting Decisions

1. Click on the "**Options**" tab.
2. Please then click on "Manage Laws and Decisions".
3. Click on the selection list labelled "Please Select Court". Select the court from the selection list where the decision that you want to delete is saved. Alternatively, you can enter the file number of the decision that you want to delete in the input field that is below the selection list.
4. If you select a court by using the selection list, then all of the decisions from the court that exist in the database will be displayed. Select the decision that you want to delete by clicking on the selection box in front of the name of the decision. You can also select more than one decision in this way.
   If you enter a file number, then a decision will be displayed. Select the decision as described above.

5. Please then click on the [Delete] button at the bottom and the task window will open. In this window, the delete process will be displayed as a new task that is to be executed.
6. Please click on the ▷ icon to start the delete process. If you want to cancel the delete process, then please click on the 🗑 icon.
7. After the successful deletion, the message, "Completed Successfully", will be displayed in the task window.
8. Please then click on the 🗑 icon to remove the successfully completed task from the task window.

8.5.5. Importing Laws and Decisions

NOTE: You must possess the "Tree Admin" administrative access right in order to be able to perform this task.

Laws and decisions may be transferred as product files (recognized by the "KIP" filename extension). In order to import such a product file, please proceed as follows:

1. Click on the "**Options**" tab.
2. Please then click on "Import Product File".
3. Click on the [Browse] button in the window that opens and select the directory where the product file that you want to import is saved. Select the corresponding file by clicking on it with the mouse and then please click on the [Open] button.
4. Please then click on the [Upload] button.
5. The task window will open after the successful upload of the file.
   In this window, the import of the product file will be displayed as a new task that is to be executed. Please click on the ▷ icon to start the import process. If you want to delete the import task, then please click on the 🗑 icon.
6. After the successful import, the message, "Completed Successfully", will be displayed in the task window. Please then click on the 🗑 icon to remove the successfully completed task from the task window.

9. The Dataroom Module

The Dataroom Module not only provides you with a central saving location for files, but also with a number of additional options for the administration, linking and use of your files and documents. In order to use the Dataroom Module, your LOGOS server installation should possess the corresponding licence. If this is the case, then you will see an additional tab labelled "**Dataroom**" at the top of your screen.

9.1. Creating Datarooms

1. Click on the "**Dataroom**" tab.
2. Open the "Settings" menu and select the "Create New Dataroom" option.
3. Enter a name for the new dataroom in the window that appears.
4. Click on the [Save] button to create the new dataroom.

9.2. Dataroom Management

The management of datarooms consists of:

- creating and editing directories
- uploading, editing and indexing files
- configuring indexing
- creating new datarooms

In order to manage datarooms, you must possess the corresponding access rights. For detailed information on the access rights are required in order to use specific functions, please refer to the table in chapter 15.5 further on in the User's Manual. In any cases of doubt, please contact the user administrator of your LOGOS server to find out about your authorization level.

9.2.1. Creating and Editing Directories

New directories are created in the selected datarooms or directories. Proceed as follows to create a new directory:

1. Select a dataroom or directory by clicking on the name of the dataroom or directory with the left mouse button.
2. Click on the menu option, "File", in the "File Manager" window and select the "New Directory" option.
3. Enter a name for the new directory and click on the [Create] button.

9.2.2. Uploading Individual Files

1. Select the dataroom and the directory to that you want to upload the new file to by clicking on it with the left mouse button.
2. Click on the [Browse] button at the bottom of the screen.

3. In the window that opens, select the file that you want to upload to the server from your local computer and click on [Open].
4. Click on the [Upload] button to upload the file to the server.

NOTE: During the upload, the system attempts to read out the contents of the file so that it can later be searched with the integrated full text search.

The following file types can be searched:

- Microsoft Word
- Microsoft Excel
- Microsoft PowerPoint
- Adobe "PDF" (if the document contains readable text and not only graphics)
- Text documents in "RTF" format
- Text documents in "TXT" format

The searchability of other file types is under preparation.
If you upload another file type, or the file is password-protected, then you will be informed that the full text search cannot be performed for the file.

9.2.3. Uploading Multiple Files

You not only have the option to upload individual files, but also to import multiple files or entire directories, including all the files and possible subdirectories that they may contain, into an existing dataroom.
In order to do so, you must first compress the files or directories that you want to upload into a single "ZIP" file using a file compression program.

1. Start by selecting the dataroom and the directory, where you want to upload the new files to, by clicking on it with the mouse.
2. Click on "Bulk upload" at the bottom of the screen.
3. Click on the [Browse] button in the window that opens and select the directory where the "ZIP" file is saved.
4. Select the "ZIP" file by clicking on it with the mouse and then click on the [Open] button.
5. Please then click on the [OK] button.
6. The task window will open after the successful upload of the file. In this window, the import of the "ZIP" file will be displayed as a new task that is to be executed. Please click on the ▷ icon to start the import process. If you want to delete the import task, then please click on the 🗑 icon.

7. After the successful import, the message, "Completed Successfully", will be displayed in the task window. Please then click on the icon to remove the successfully completed task from the task window.

9.2.4. Editing Files (Moving, Copying, Renaming and Deleting)

The following options are available for files on the server

- Moving
- Copying
- Renaming
- Deleting

If you want to move a file from one directory to another directory, then proceed as follows:

1. Click on the file in question with the right mouse button.
2. Select the "Cut" option from the shortcut menu with the left mouse button.
3. Click on the name of the directory that you want to move the file to with the right mouse button and select the "Insert" option from the shortcut menu by clicking on it with the left mouse button. The file will now be moved to this directory.

In order to ensure data consistency on the server, files cannot be physically copied from one directory to another directory. Therefore, each file can only exist once on the server. However, you have the option to create a link to a file in another directory:

1. Click on the original file with the right mouse button.
2. Select the "Copy" option from the shortcut menu with the left mouse button.
3. Click on the name of the directory where you want to create a link to the file with the right mouse button and select the "Insert Link" option from the shortcut menu by clicking on it with the left mouse button. A link to the original file will now be inserted in the directory. If users click on this link, the original file will be opened.

In order to rename a file, proceed as follows:

1. Click on the original file with the right mouse button.
2. Select the "Rename" option from the shortcut menu with the left mouse button.
3. Enter the new filename and click on the [OK] button.

In order to delete a file, click on the file that you want to delete with the right mouse button and select the "Delete" option from the shortcut menu by clicking on it with the

left mouse button. You will now be asked whether you want to delete the file. Confirm the deletion of the file by clicking on [Delete] or cancel deletion by clicking on [Cancel].

You have the option to delete all the files in a dataroom at once. In order to do so, select the corresponding dataroom with the mouse, open the "Settings" menu and then select the "Delete All Files" option.

9.2.5. Deleting Directories

In order to delete a directory with all of the files and possible subdirectories that it contains, proceed as follows:

1. Select the directory that you want to delete by clicking on it with the mouse.
2. Open the "File" menu and select the option, "Delete recursive".
3. Confirm your selection by clicking on the [Delete] button in the dialog box that appears and the task window will open. In this window, the deletion of the directory will be displayed as a new task that is to be executed. Please click on the icon to start the delete process. If you want to cancel the delete process, then please click on the icon.
4. After the successful deletion of the directory, the message, "Completed Successfully", will be displayed in the task window. Please then click on the icon to remove the successfully completed task from the task window.

9.2.6. Configuring Indexing

You have the option to assign certain predefined keywords to every file on the server. If this function is in use, it will not only be possible to search for files by using their filename or content, but also by using the keywords. (For example, if one entered the keywords "Smith" and "Jones" for a search, one would be able to find all the files that were assigned these keywords, regardless of their content or filenames.)

This indexing of individual files must be prepared by determining which categories of keywords should be available for the files in each dataroom. The categories that are available are; e.g. "Author Name" or "Company Name".

The categories apply for the entire dataroom and therefore the keywords in the individual categories can be assigned to every file within the dataroom.

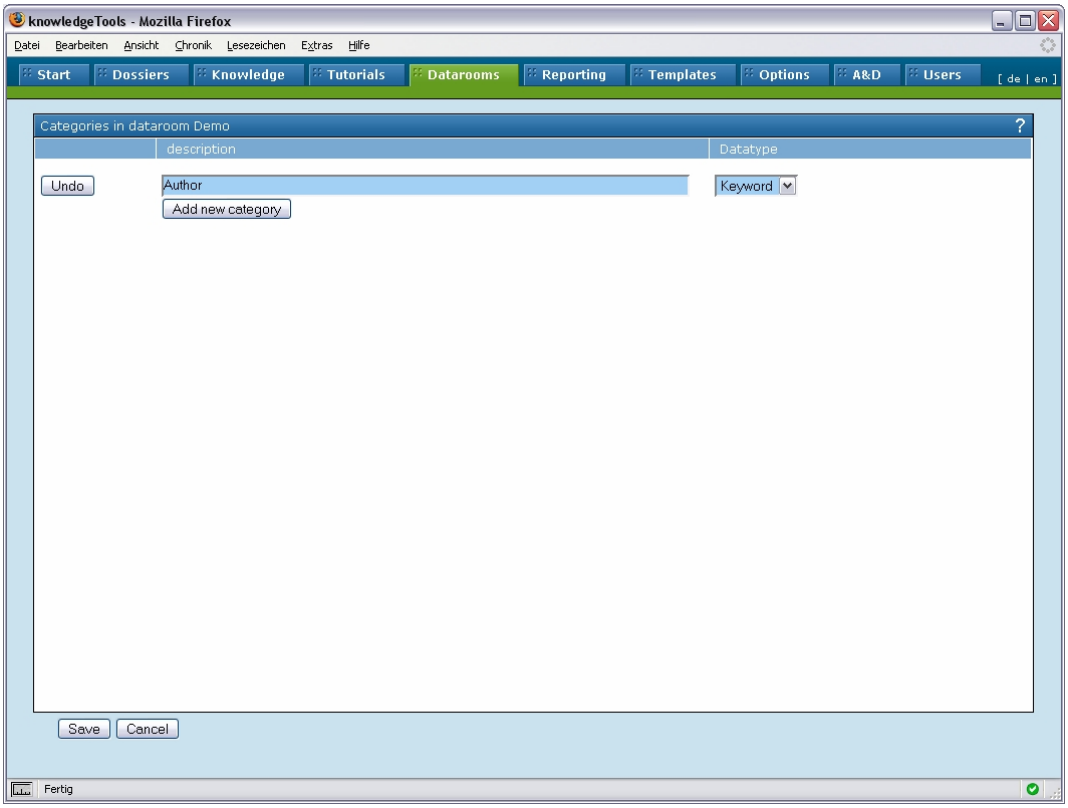

Fig.: The indexing settings

1. In order to configure the indexing, first select a dataroom in the File Manager by clicking on the name of the dataroom with the left mouse button.
2. Open the "Settings" menu and select the menu option, "Configure Indexing".
3. You can now access an empty page by clicking on the [Add New Category] button.
4. Enter the name of the first new category in the input field that now appears.
5. By using the drop-down list on the right of the input field, select the type of category that you want to add. The following categories are available:
   - **Keyword** (only text can be entered in this field category)
   - **Date** (only dates can be entered in this field category)
6. Click on [Add New Category] to add another category or
7. Click on [Save] to save your entries.

9.2.7. Indexing Files

Once the indexing has been configured, you can assign keywords to the individual files:

1. Select the file that you want to index by clicking on the name of the file with the right mouse button.
2. Click on the "Properties" option in the shortcut menu with the left mouse button.
3. On the next page, the selected properties of the file and the input fields for the keywords will be displayed.

4. The "Date" fields can be recognized by the drop-down lists. Enter a date by using the drop-down list to select the required date. The "Keyword" fields are basic input fields into which you can enter normal text.
5. Once you have entered the keywords, click on the [Save] button to save your entries.

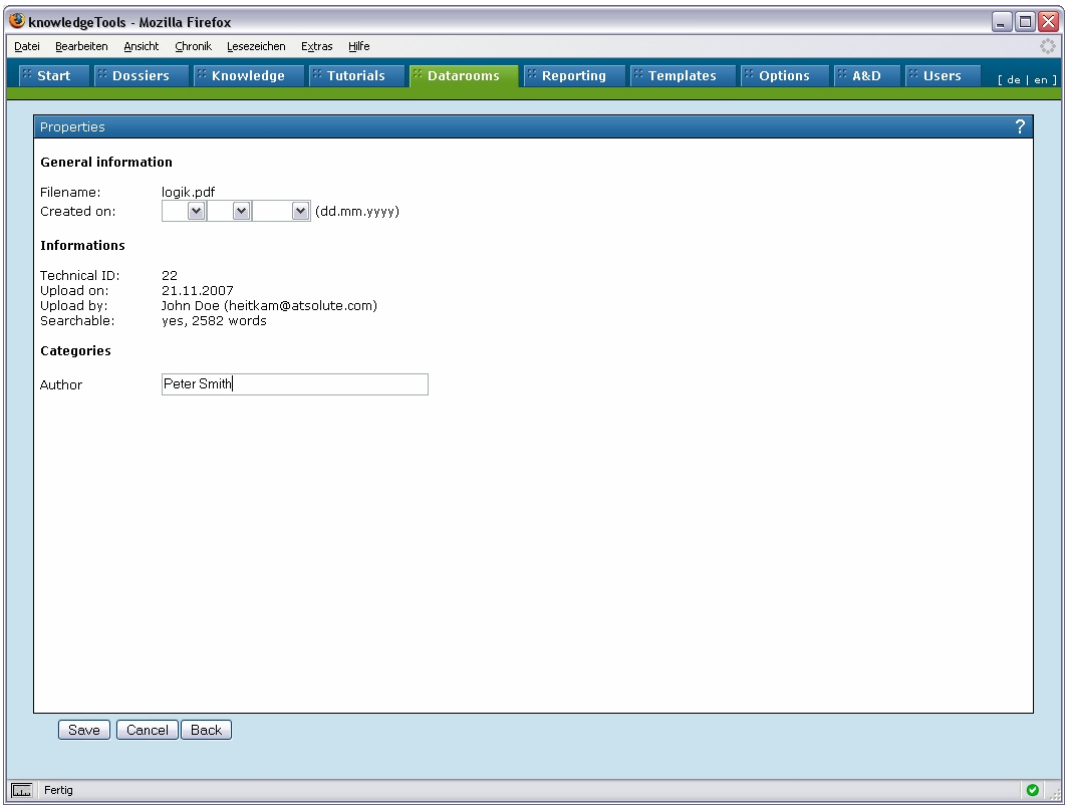

Fig.: The "File Properties" page

9.2.8. Deleting Datarooms

The user has the option to delete datarooms, including all of the directories and files that they may contain.

NOTE: Please note that the dataroom that you want to delete may be referred to in other knowledgeTools on your server! These may also be knowledgeTools to which you personally do not have any access rights. Therefore, before deleting a dataroom, please make sure that a dataroom is no longer required by any other user.
Select the dataroom that you want to delete in the dataroom view and then open the "Settings" menu and click on the "Linked Datarooms" option. A list of the knowledgeTools with which the dataroom is linked will now be displayed.

In order to delete a dataroom, proceed as follows:

1. Select the dataroom that you want to delete by clicking on it with the mouse.
2. Open the "Settings" menu and select the "Delete Dataroom" option.
3. Confirm your selection by clicking on the [Delete] button in the dialog box that appears and the task window will then open. In this window, the deletion of the dataroom will be displayed as a new task that is to be executed. Please click on the icon to start the delete process. If you want to cancel the delete process, then please click on the icon.
4. After the successful deletion of the dataroom, the message, "Completed Successfully", will be displayed in the task window. Please then click on the icon to remove the successfully completed task from the task window.

9.3. Navigation in the Dataroom

The data in the dataroom is stored in a hierarchical directory structure (as used by Windows Explorer).

In order to display the contents of a directory, click on the name of the directory with the left mouse button. If the directory contains any files, then these will be displayed on the right-hand side of the screen.

If the directory contains subdirectories, then a "plus" sign will be displayed in front of the name of the directory. Click on it once to open the directory structure and to display the subdirectories.

If you move the mouse pointer over the name of the file, an information window will appear with the properties of the respective file.

The following properties will be displayed:

- *Filename*
- *Technical ID* of the file
- *Application type* of the file (e.g. Word or Excel)
- *Technical checksum* of the file
- *Creation date* of the file (when the file was originally created)
- *Upload date* of the file (when the file was originally uploaded to this server)
- *Uploaded by* (who uploaded the file to the server)
- *Searchability* (whether the contents of the file can be searched in with the integrated full text search)

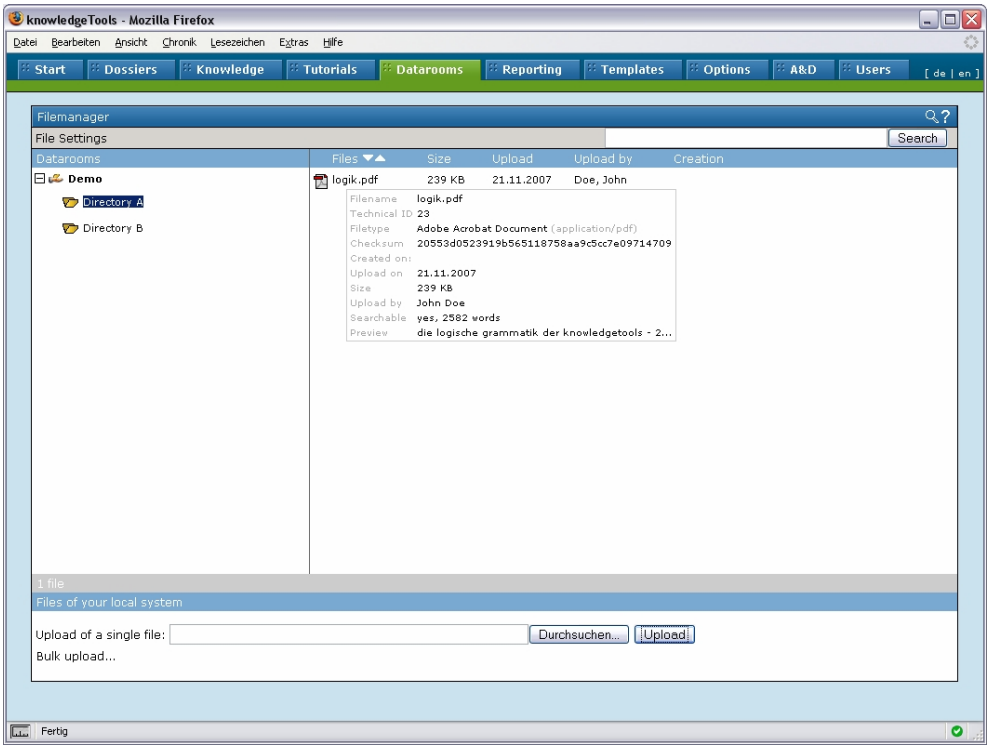

Fig.: The display of the file properties in the directory view

In order to open a file, click on the filename once with the right mouse button. A shortcut menu will now appear. Click on the "Open" option in the shortcut menu with the left mouse button.

9.3.1. Finding Files

There are several options available for searching for files in datarooms.
You can search for:

- filenames
- file content (full text search in all the contents of the file)
- keywords (that have previously been assigned to the individual files)
- the creation date
- the upload date
- other data that has been assigned to a file as a keyword.

When using the date search, you can determine whether you want to narrow your search to:

- a **specific** date (e.g. for all files that were created on 21.02.2001),
- a period **before** a specific date (e.g. for all files that were created before 21.02.2001),
- a period **after** a specific date (e.g. for all files that were created after 21.02.2001), or

- a period with a specified **start and end date** (e.g. for all files that were created between 21.02.2001 and 14.05.2001).

When using the search function, you can choose between a quick search and a detailed search. The quick search is always available at the top right-hand corner of the File Manager. Enter a search term in the input field and click on the [Search] button.
Any files that are found will be displayed on the right-hand side of the screen.
Please note that the search will always be performed in the directory that is selected at the time. If you want to search in all the directories, then first click on the parent dataroom and then start the search.

In order to perform a detailed search, click on the magnifier icon at the top right-hand corner of the screen and a search mask will open:

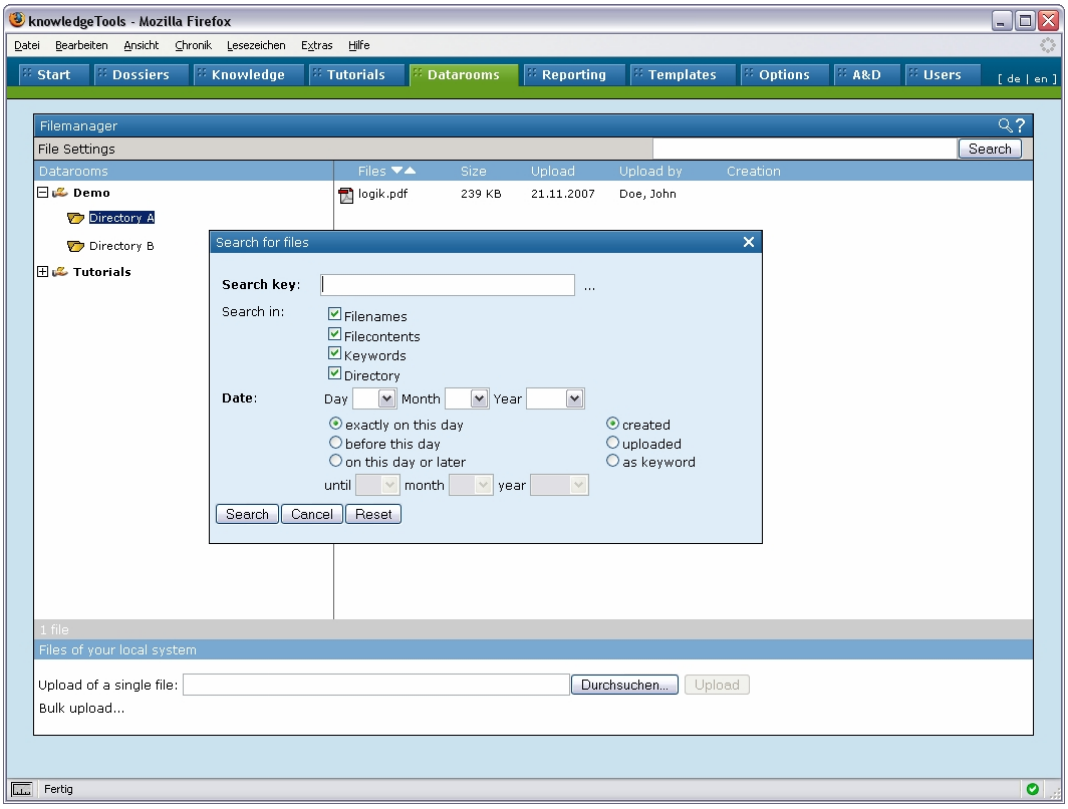

Fig.: The "Search For Files" search mask

If you want to search for a term (not a date), then enter the term in the field labelled "Search Term". In the default version, this term is used for searching filenames, file contents and keywords. You have the option to narrow the search by deselecting the individual options in the corresponding check boxes.

If you want to use the date search, then first select the required date by using the drop-down lists for the "Day", "Month" and "Year".

In the default version, the search is performed for all files that were created on the specific date.

By using the "Upload" and/or "Keyword" radio buttons, you also have the option to search for files that were uploaded to the server on a specific date or that have been assigned the date as a keyword.

If, instead of searching for files on a specific date, you want to search for files from a period before the selected date, then click on the radio button "Before This Date".

If you want to search for files from a period after the selected date, then click on the radio button "On This Date or Later".

If you want to search for files from a specific period, then select an end date for the period by using the drop-down lists at the bottom of the window.

Click on [Search] to start the search. Please note that the search may take longer depending on the quantity of data that must be searched.

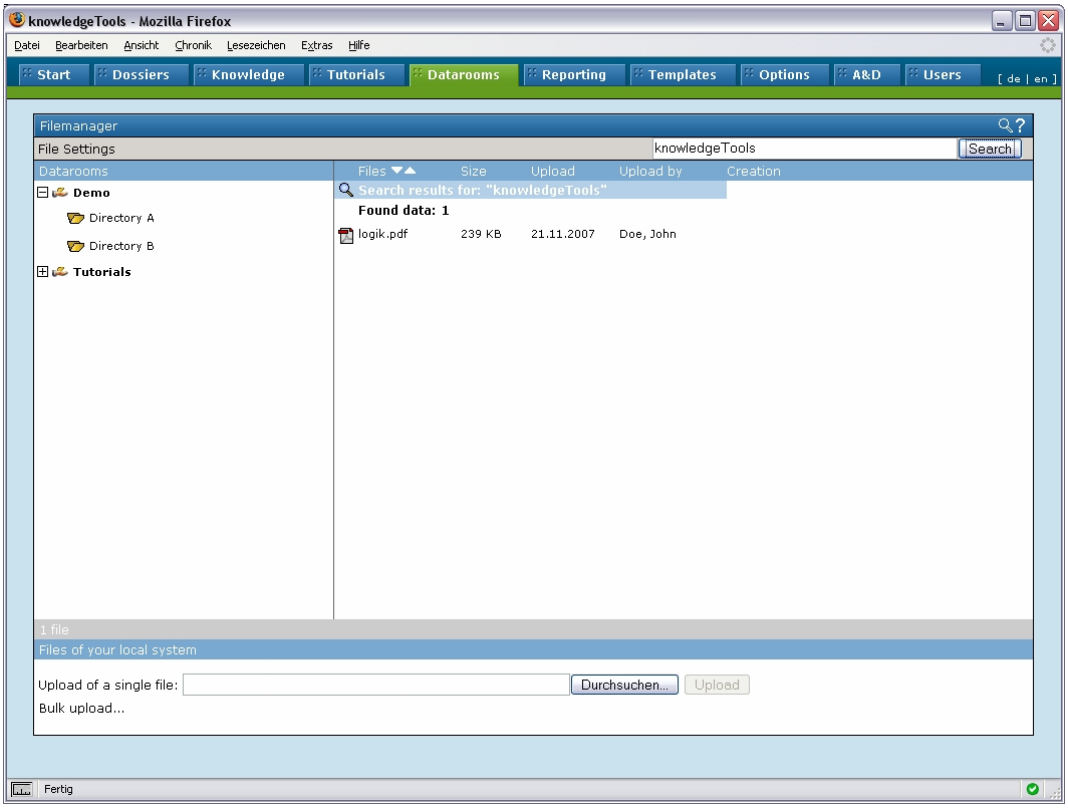

Fig.: The display of the search results

The search results will be displayed on the right-hand side of the screen.

If you move the mouse pointer over the search results, then the directory of the file will also be displayed in the "Properties" window. In order to open a file in the search results,

click on the name of the file with the right mouse button and then select the "Open" option with the left mouse button.

Your search criteria will be displayed in the quick search window and will remain in the search mask so that you can modify the search terms without having to re-enter all the data.

9.4. Using Dataroom Files in Trees

Trees that have been configured accordingly also have an additional sidebar on the right-hand side of the screen. The files of a dataroom that are assigned to a tree will be displayed in this sidebar. These files can be linked in the highest resolution to the individual nodes of the tree displayed on the left-hand side.

At the top of the sidebar, there are tabs describing the different datarooms; you can switch between the different contents by clicking on the tabs with the mouse. The active tab is always green.

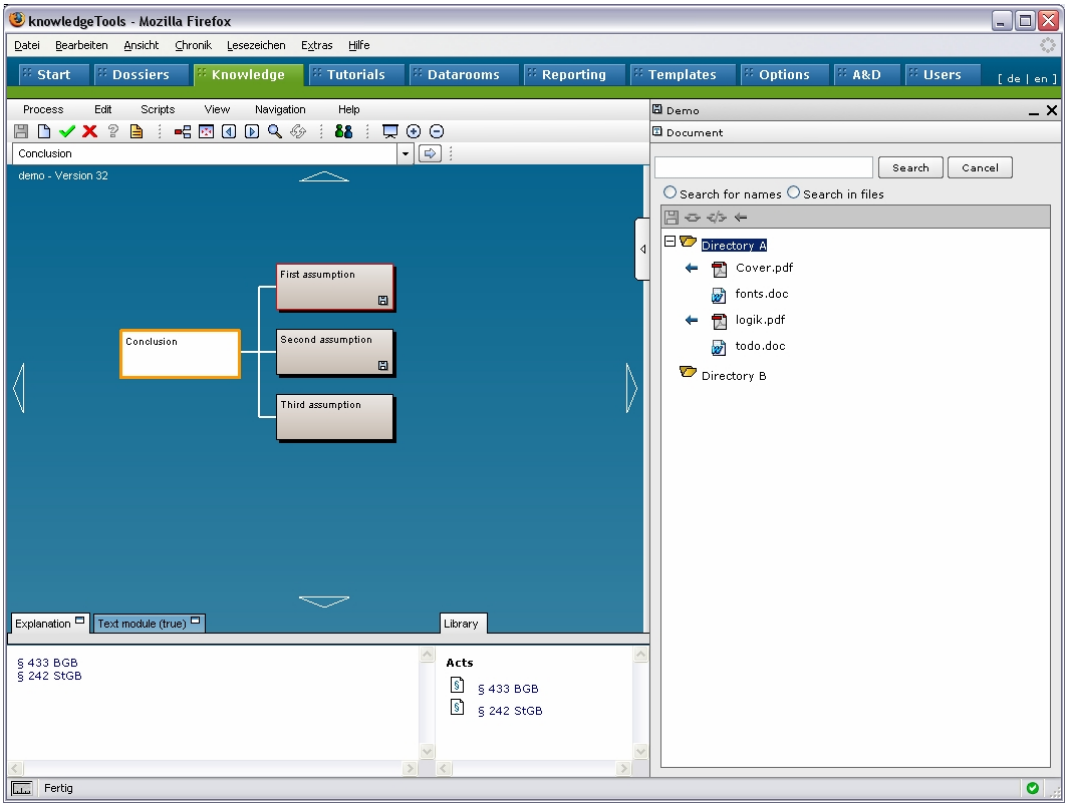

Fig.: The sidebar

The individual nodes of the tree can be linked to individual files in the sidebar. In this case, a file can be linked to several nodes at the same time.

If a node is linked to a file, then the 🖫 icon will be displayed at the bottom right-hand corner of the node. In addition, the name of the file will be displayed in the "Library" window at the bottom of the screen.

If you click on the icon, then the directory that contains the file will be expanded in the sidebar and the name of the file will be highlighted in blue.

It is also possible for a node to be linked to several files. In this case, the directory that contains the first of the linked files will be opened when you click on the 🖫 icon and it is highlighted in blue.

All the other linked files are displayed at the bottom of the screen in the "Library" window.

If you are not navigating through the tree, but through the files in the directory view, then the files that are linked to a node are indicated by a blue arrow.

Click on the arrow to display the node that the file is linked to.

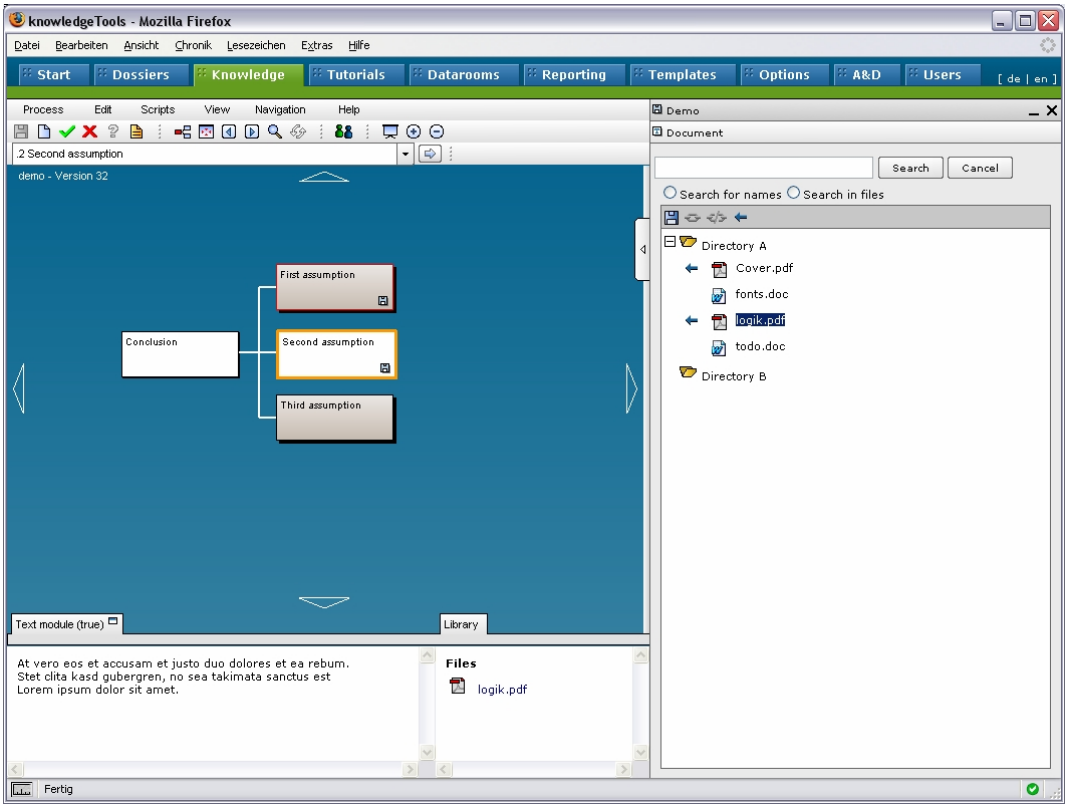

Fig.: The sidebar with the linked dataroom files

If the file is linked to several nodes, then a selection window will open if you click on the blue arrow. All the nodes that are linked to the files will be displayed in the selection window. In order to display one of these nodes, simply click on the node title.

9.4.1. Opening Files

In the sidebar, the files are displayed in the hierarchical directory structure of the dataroom. In order to display the contents of a directory, click on the name of the directory with the left mouse button. If the directory contains files, then these will be displayed under the name of the directory.
If the directory contains subdirectories, then a "plus" sign will be displayed in front of the name of the directory. Click on it once to open the directory structure and display the subdirectories.
If you move the mouse pointer over the name of the file, an information window will appear with the properties of the respective file.

The following properties will be displayed:

- *Filename*
- *Technical ID* of the file
- *Application type* of the file (e.g. Word or Excel)
- *Technical checksum* of the file
- *Creation date* of the file (when the file was originally created)
- *Upload date* of the file (when the file was originally uploaded to this server)
- *Uploaded by* (who uploaded the file to the server)
- *Searchability* (whether the contents of the file can be searched in with the integrated full text search)

In order to open a file, click on the filename once with the right mouse button and a shortcut menu will appear. Click on the "Open" option in the shortcut menu with the left mouse button. Alternatively, you can also open the file by double clicking it.

9.4.2. Downloading Datarooms or Directories

The user has the option to download the individual directories of a dataroom including all of the files that they contain, or to download entire datarooms, including all of the directories and files that they contain, as a "ZIP" file. In order to do so, proceed as follows:

1. Select the corresponding directory or the corresponding dataroom by clicking on it with the mouse.
2. Open the "File" menu and select the option, "Download as ZIP File".
3. The task window will now open. In this window, the download of the dataroom or the directory will be displayed as a new task that is to be executed. Please click on the icon to start the download process. If you want to delete the task, then please click on the icon.

4. After the successful download, the message, "Completed Successfully", will be displayed in the task window. Click on the icon to save the "ZIP" file on your computer.
5. Please then click on the icon to remove the successfully completed task from the task window.

9.4.3. Displaying and Hiding the Sidebar

You can display or hide the sidebar according to your requirements. Click on the [**X**] at the top right-hand corner to close the sidebar.
Open the "View" menu and click on the "Sidebar" option to display the sidebar.

9.4.4. Creating Links Between Nodes and Files

The creation of links between the files and nodes of a tree occurs in two steps:

- start by selecting the dataroom that you want the tree to access
- then link the individual files of the dataroom to the nodes of the tree.

NOTE: You can also determine that a tree can access more than one dataroom and consequently, also the files that it contains.

In order to link the nodes of a tree to files in a dataroom, proceed as follows:

1. Open the tree in structure editor mode.
2. Open the "Navigation" menu and click on the option, "Open Technical Tree Properties".
3. Scroll down to "Scripts and file shares".
4. Click on the lower selection list labelled "Select file shares".
5. All of the available datarooms will now be displayed in the list. Select one or more datarooms by clicking on them once with the left mouse button.
6. Click on the [Save] button. The "Technical Tree Properties" window will now close and a dialog box will appear. Click on the [Reload] button in the dialog box and the sidebar will appear on the right-hand side of the screen with the datarooms that you have selected.

You can now link individual files in the sidebar to the nodes of the tree:

1. In the tree, navigate to the node that you want to link a file to.
2. In the sidebar, navigate to the file that you want to link to the node.
3. Click on the name of the file with the right mouse button and select the "Link" option from the shortcut menu that appears. The file is now linked.

A file can also be linked to more than one node. In order to do so, simply select another node and repeat the steps described above.

9.4.5. Deleting Links Between Files and Nodes

You can always delete the links between files in the sidebar and nodes at a later stage. In order to do so, click on the corresponding file with the right mouse button and select the "Unlink" option from the shortcut menu.

Please note that the deletion of the link only refers to the link between the files and the respective selected node of the tree. If the file is linked to other nodes of the tree and you want to delete all the links, then you have to delete the link for each node individually.

You can also display the nodes that the file is linked to. In order to do so, click on the file with the right mouse button and select the option "List of Linked Nodes" from the shortcut menu. The list will now be displayed in a new window. You can quickly access the individual nodes in the list by clicking on the title of the node in the selection window. In order to delete all the links to all the nodes, access the nodes in the list one after another and delete the link to the file as described.

9.4.6. Searching in Files

You can search for filenames and full text in the files that are displayed in the sidebar. As the files that are displayed in the sidebar are the files that are in the dataroom, the same restrictions apply for a full text search in the sidebar as for a search in the dataroom; password-protected or other unreadable documents cannot be searched for; only the file types listed above in chapter 9.2.2 can be searched.

1. Click on the "**Files**" tab (if it is not yet open).
2. Select the dataroom or directory that you want to search by clicking on the name of the dataroom or directory with the left mouse button.
3. Enter the search term in the input field.
4. Select whether you want to search for the filename or in the files, by clicking on the corresponding selection button.
5. Click on "Search".

After the search has been completed, the number of search results, as well as a list of all the files that were found will be displayed in a list.

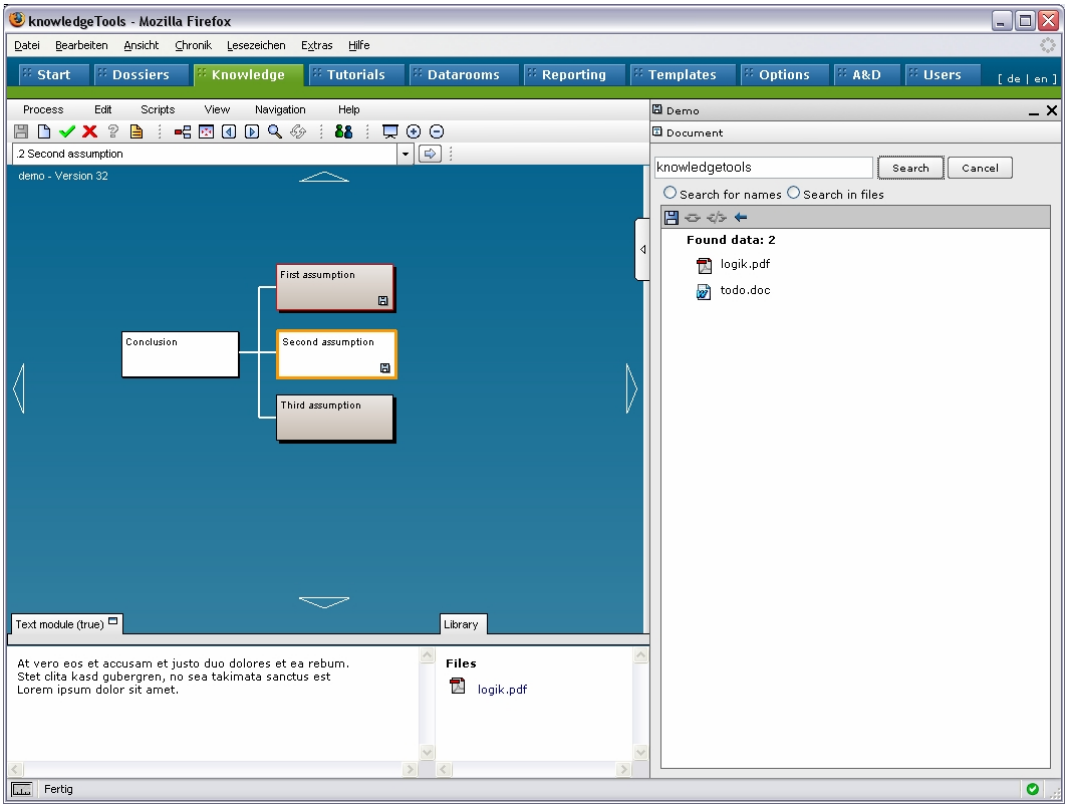

Fig.: The display of the search results in the sidebar

If you move the mouse pointer over the name of the file, then the properties of the file will be displayed, including the directory in which the file was found.

In order to open a file, click on the name of the file with the right mouse button and then select the "Open" option with the left mouse button. Alternatively, you can also open the file by double clicking it.

Click on [Cancel] to return to the display of the entire dataroom.

10. The Script Editor

The user has the option to edit documents, which have been created in MS Word and imported into the LOGOS server, within the application and to link them in high resolution, in the form of so called **scripts**, to the nodes of a tree.
In addition, you also have the option to do the following independently from MS Word:

- create your own scripts directly within the application,
- link individual text sections of the script to individual nodes of a tree and
- publish these scripts as "PDF" or "RTF" documents (for further processing in MS Word)

Scripts are created within a tree; however, they may also be integrated in other trees.

NOTE: These functions are only available if the Dataroom Module is installed.

10.1. Importing MS Word Documents as Scripts

NOTE: You must possess the "Tree Admin" administrative access right in order to be able to perform this task.

1. Click on the "**Options**" tab.
2. Please then click on "Import MS Word Document".
3. Enter a name for the document that you want to import in the upper input field of the window that opens. The document will be displayed with this name after being imported as a script.
4. Next, click on the [Browse] button and select the directory where the MS Word document that you want import is saved. Select the document by clicking on it with the mouse and then click on the [Open] button.
5. Please then click on the [Upload] button.
6. The task window will open after the successful upload of the file.
   In this window, the import of the document will be displayed as a new task that is to be executed. Please click on the icon to start the import process. If you want to delete the import task, then please click on the icon.
7. After the successful import, the message, "Completed Successfully", will be displayed in the task window. Please then click on the icon to remove the successfully completed task from the task window.

Documents that are imported as scripts are initially not visible to any users. The access of the users to the new script must first be activated. This process is described further on in the User's Manual in the chapter titled, "*Manage Access to Scripts*".

10.2. Creating New Scripts

In order to create new scripts in a tree, you must possess structure editor rights for the tree in question.

1. Open the tree in structure editor mode and open the "Scripts" menu.
2. Select the "Create script" option.
3. Enter a name for the new script.
4. Click on the [Save] button below.

A sidebar will now appear on the right-hand side of the screen with the Script Editor. This editor can be used to create and edit the contents of scripts.

The Script Editor is structured (from top to bottom) as follows:

- the search field – with the search mask for searching in the script
- the toolbar – with all of the script editing options
- the display area – where the script is displayed.

You can create as many scripts as you want within a tree. In order to do so, simply repeat the above-described steps 6 and 7.

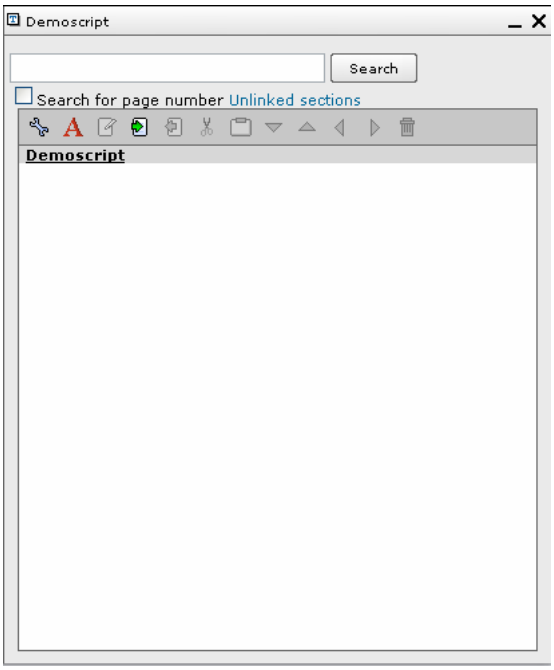

Fig.: The Script Editor

10.3. Creating Script Contents

When a new script is created, only the name of the script is displayed in the editor. The toolbar above the name of the script is initially disabled. The icons that are activated in the toolbar depend on the elements of the script that are clicked on within the course of further editing.

Scripts are structured documents, i.e. they consist of hierarchically structured headings (referred to in the following as "Sections"), which can have text blocks assigned to them.

10.3.1. Creating Sections

1. Click on the name of the script in order to create the first section of the script.
2. Click on the icon in the toolbar of the Script Editor.
3. A window will open on the left, next to the Script Editor, where you can enter the name of the new section.
4. Enter the name in the window and click on [Save]. The section has now been created and will be displayed in the Script Editor window.

You now have the option to create more sections on the same level or to create new sections below the newly created section.

Sections are always created below the currently selected element:

- In order to create a section on the same level, click on the *name of the script* and the script name will be coloured; then repeat steps 2 to 4.
- In order to create a section below the newly created section, click on the *name of the section*; the section name will be coloured; repeat steps 2 to 4.

In this way, you can create a hierarchical document structure. Once you have determined the structure of the document by creating the headings, you can enter the text of the script under the heading.

10.3.2. Creating Text Blocks

1. Select the section that you want to add a text block to by clicking on it with the mouse.
2. Click on the icon in the toolbar of the Script Editor.
3. A window will open on the left, next to the Script Editor. You can enter and edit text in this window. The functions of this text editor are practically identical to the functions of the one for editing the additional texts. The only functions that are not available are the functions for integrating images, files, input fields and master data fields.
4. Click on the [Save] button in order to save the text that you have entered. Click on [Delete Text] in order to delete the existing text.

A number will appear on the left, next to the newly created text block; this is the unique ID of the text block. The ID is useful for an improved overview, e.g. when you want to move text blocks (see below). The ID is only visible in editor mode.

You can create as many text blocks as you want under a section. If you select a text block (or a text block is already selected), the next new text block will be created *under* the currently selected text block.

10.3.3. Renaming Scripts and Setting Links

You have the option to rename existing scripts.

1. In order to do so, click on the underlined name of the script in the Script Editor.
2. Click on the icon and the "Edit Script" window appears.
3. The current name of the script is displayed in the input field labelled "Name". Enter the new name of the script in this input field and click on the [Save] button.

Scripts can be automatically linked to files. For example, if you enter the name of a certain file in a script, then this name automatically becomes a link that opens the corresponding files. In order to use the automatic linking function:

- the files must be located in a dataroom on the server;
- this dataroom must be entered in the properties of the script;
- the names of the files must follow a standardized nomenclature (e.g. "document1.pdf", "document2.pdf", etc.);
- the nomenclature must be entered in the properties of the script, so that the files that you want to link are recognized by the system.

Therefore, you must first create a dataroom on the server and upload the files that you want to link to the dataroom. Alternatively, you can also upload the files to an existing dataroom.

Open the "Properties" window of the script that you should contain the links to the files by clicking on the name of the script and then on the icon. Click on the "Select" link and all the existing datarooms that are available to you will now be displayed in a new window. Select the dataroom that contains the files by clicking on it once with the mouse. If you have uploaded the files to a subdirectory of the dataroom, then please select the subdirectory in question. Click on the [Apply] button and the selected dataroom, as well as any directory that may have been selected, will be displayed above the "Select" link. You can always undo this selection by clicking on the link labelled "Undo Link".

You must now enter the nomenclature for the files that you want to link in the input fields labelled "Regex" and "Format String of the Files". Please contact knowledgeTools directly for the necessary information.

10.4. Editing Existing Scripts

10.4.1. Editing Sections and Text Blocks

You have the option to edit existing section headings and text blocks.

1. Select the element that you want to edit (section or text block) by clicking on it with the mouse.
2. Click on the icon and a window will open on the left, next to the sidebar. You can change the contents of the element in this window.
3. Finish by clicking on the [Save] button to save your changes.

10.4.2. Moving Elements

You have the option to move *text blocks vertically within a section* or to move entire *sections within a script vertically and horizontally*. When you move a section, the subordinate elements (i.e. sections and text blocks) are *always* moved with it.
Select the element (section or text block) that you want to move by clicking on it with the mouse; the element will now be highlighted. You can now move the element up or down by clicking on the or icons. If it is no longer possible to move an element up or down, then the corresponding icon will be disabled. By using the or icons, you can move sections horizontally. When a section is moved horizontally, this is equivalent to being moved one level down (move to the right) or one level up (move to the left) in the hierarchy of the structure. If it is no longer possible to move an element to the left or the right, then the corresponding icon will be disabled.

10.4.3. Moving Text Blocks by Using Cut and Paste

Text blocks can only be moved within a section using the above-described method. However, you can also move text blocks within the script.

1. Select the text block that you want to move by clicking on it with the mouse.
2. Click on the icon.
3. Click on the section where you want to paste the text block.
4. Click on the icon and the text block will be pasted *below* any existing text blocks in the section. If you want to paste the text block *above* an existing text block, then click on the corresponding text block before pasting it.

10.4.4. Merging Text Blocks

You have the option to merge two consecutive text blocks into a single text block. In order to do so, please proceed as follows:

1. Select the upper of the two text blocks by clicking on it once with the mouse.

2. Click on the icon. The two text blocks will now be merged into a single text block.

10.4.5. Deleting Elements

Select the element (section or text block) that you want to delete by clicking on it with the mouse. Click on the icon in the toolbar of the Script Editor and you will be asked whether you really want to delete the selected element. Click on [OK] to delete the element. Click on [Cancel] if you do not want to delete the element.

NOTE: If you delete a section, all the subordinate elements will also be deleted! (Example: if you delete section 1, then sections 1.1 and 1.2, including any text blocks that they may contain, will also be deleted.)

10.5. Integrating Existing Scripts in Trees

You have the option to integrate scripts that exist on the server in a tree. In order to do so, you must possess read access to the script that you want to integrate (see above).

1. Open a tree in editor mode.
2. Open the "Navigation" menu and click on the "Open Technical Tree Properties" option.
3. Scroll down to "Scripts and file shares".
4. Click on the "Select Scripts" selection list below it. All of the existing scripts on the server, for which you possess at least read access, will be displayed in the list. Click on the script that you want to integrate. You can also click on more than one script.
5. Click on the [Save] button.
6. The "Technical Tree Properties" window will close. Click on the [Reload] button; the client will reload and the selected script(s) will be displayed on the right-hand side of the screen.

10.6. Links Between Nodes and Text Sections

In the default version, you can create links between the nodes of a tree and individual files, e.g. documents. In this case, however, the link is always to the entire document.
On the other hand, if you are using scripts, a node can be linked to different sections of a script or even different sections of different scripts.
If a node is linked to a text section, then this will be indicated by the presence of the icon at the bottom right-hand corner of the node. If you click on the icon, then the linked text section will be displayed in the sidebar and highlighted in grey.

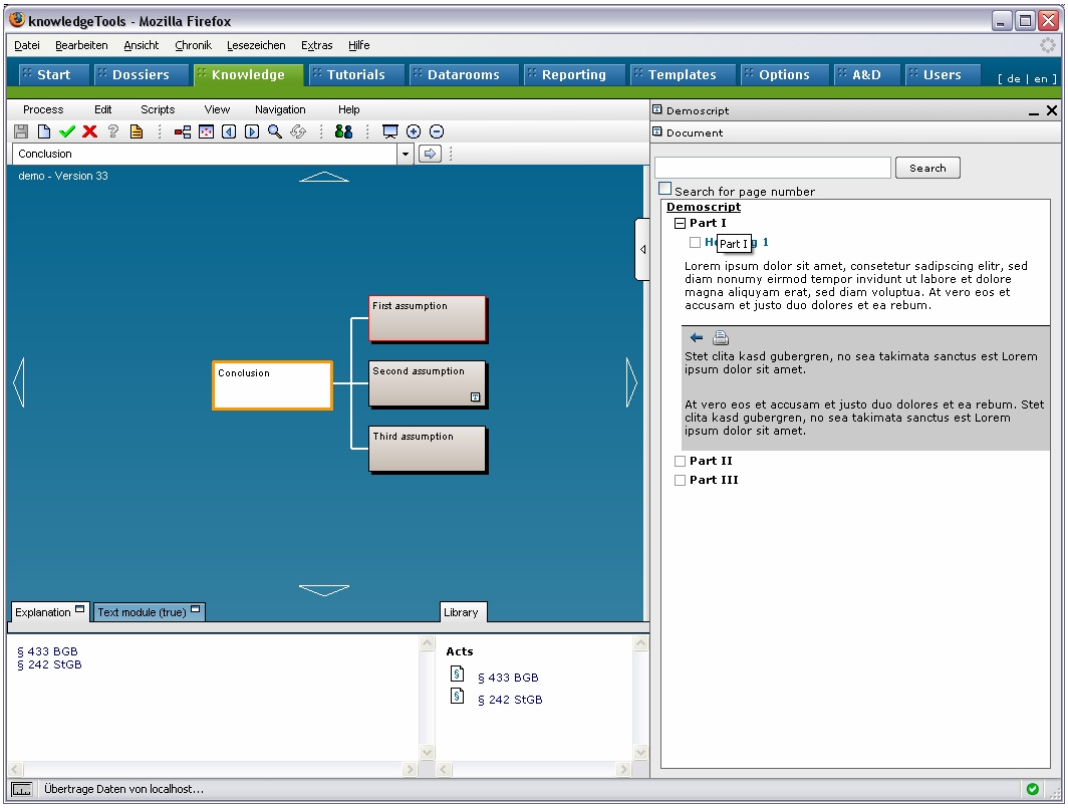
knowledgeTools - Mozilla Firefox
Datei Bearbeiten Ansicht Chronik Lesezeichen Extras Hilfe
Start Dossiers Knowledge Tutorials Datarooms Reporting Templates Options A&D Users [de | en]
Process Edit Scripts View Navigation Help
Conclusion
demo - Version 33
First assumption
Conclusion
Second assumption
Third assumption
Explanation
Text module (true)
Library
§ 433 BGB
§ 242 StGB
Acts
§ 433 BGB
§ 242 StGB
Übertrage Daten von localhost...
Demoscript
Document
Search
Search for page number
Demoscript
Part I
Lorem ipsum dolor sit amet, consetetur sadipscing elitr, sed diam nonumy eirmod tempor invidunt ut labore et dolore magna aliquyam erat, sed diam voluptua. At vero eos et accusam et justo duo dolores et ea rebum.
Stet clita kasd gubergren, no sea takimata sanctus est Lorem ipsum dolor sit amet.
At vero eos et accusam et justo duo dolores et ea rebum. Stet clita kasd gubergren, no sea takimata sanctus est Lorem ipsum dolor sit amet.
Part II
Part III

Fig.: The sidebar with a linked text section

If the node is linked to text sections in different texts, then the linked text section in the first document will be displayed first.

The tab of the second document that also contains a linked text section will be coloured blue. If you click on the tab, then the linked text section in the document will be displayed.

If you are navigating through the files in the sidebar, rather than the tree, then the sections in the texts that are linked to a node are indicated by a blue arrow at the beginning of the section. Click on the blue arrow to access the node that the section is linked to.

If the text section is linked to several nodes, then a selection window will open if you click on the blue arrow. All the nodes that are linked to the text section will be displayed in this selection window. In order to display one of these nodes, simply click on the node title.

10.6.1. Opening Texts

The texts in the sidebar are displayed in a hierarchical structure in accordance with the document structure. The headings are highlighted in blue.

If a heading has a sub-heading, then a "plus" sign will be displayed in front of the heading. Click on the "plus" sign to open the document structure and display the sub-headings.
In order to access the text contained under a heading, click on the heading. If you click on the heading a second time, the text will disappear again.

NOTE: Some headings contain sub-headings, but no text of their own. In this case, the subordinate document structure will open when you click on the heading, but no text will be displayed.

Texts may contain links to laws, which will then be highlighted in blue. If you click on a link to a law, then it will be displayed in full text in a new window.

10.6.2. Creating Links Between Nodes and Text Sections

In order to display and link documents, the documents must first be imported to the LOGOS server.
The linking of texts and nodes in a tree occurs in three steps:

- select which of the imported documents the tree should access
- define the sections in the individual documents that you want to link to nodes
- finish by linking the sections to the nodes of the tree.

NOTE: You can also determine that a tree can access more than one document.

1. Open the tree in structure editor mode.
2. Open the "Navigation" menu and click on the option labelled "Open Technical Tree Properties".
3. Scroll down to "Scripts and file shares".
4. Click on the lower selection list labelled "Select scripts".
5. All of the available documents will now be displayed in the list. Select one or more documents by clicking on them once with the left mouse button.
6. Click on the [Save] button. The "Technical Tree Properties" window will close and a dialog box will appear. Click on the [Reload] button in the dialog box. The sidebar will now appear on the right-hand side of the screen with the datarooms that you have selected.

If you have selected several documents, then the names of the documents will be displayed in individual tabs. You can switch between the documents by clicking on the tabs with the mouse. The documents are displayed in a hierarchical structure in accordance with the document structure.

You can navigate within the documents by clicking on the individual headings or on the plus signs in front of the headings.

In the next step, you have to define the sections of the document that you want to attribute the link option to. A blue anchor icon will automatically be inserted in front of each section of the document.

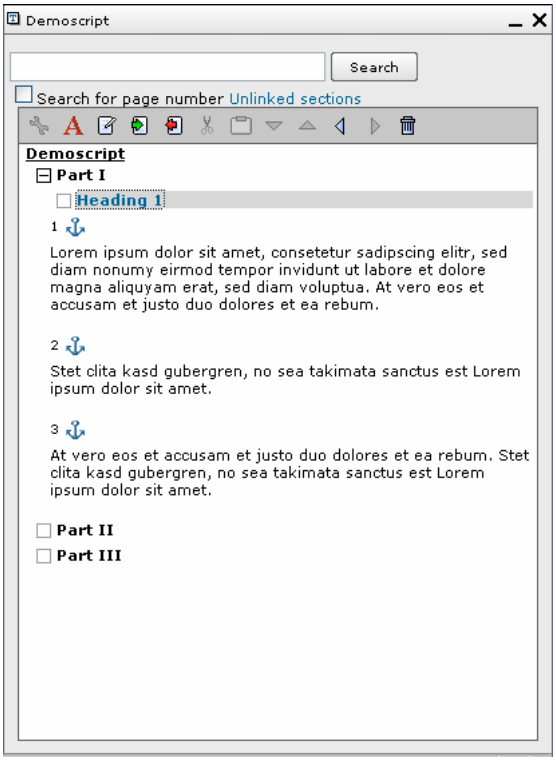
Demoscript
Search
Search for page number Unlinked sections
Demoscript
Part I
Heading 1
1
Lorem ipsum dolor sit amet, consetetur sadipscing elitr, sed diam nonumy eirmod tempor invidunt ut labore et dolore magna aliquyam erat, sed diam voluptua. At vero eos et accusam et justo duo dolores et ea rebum.
2
Stet clita kasd gubergren, no sea takimata sanctus est Lorem ipsum dolor sit amet.
3
At vero eos et accusam et justo duo dolores et ea rebum. Stet clita kasd gubergren, no sea takimata sanctus est Lorem ipsum dolor sit amet.
Part II
Part III

Fig.: A document in the sidebar with an open hierarchy structure

By using these icons, you can attribute the link option to individual sections of the document. Click on the anchor icon in front of the section that you want to link with the left mouse button. The anchor icon will then change into this icon and a chain icon will appear next to the anchor icon.
The entire section, as well as all the subsequent sections of the document up until the next structure level of the document, will now be selected as sections that have the option to be linked. Therefore, according to the example in the following illustration, the entire section between “Heading 1.1” and “Heading 1.2” has the option to be linked.

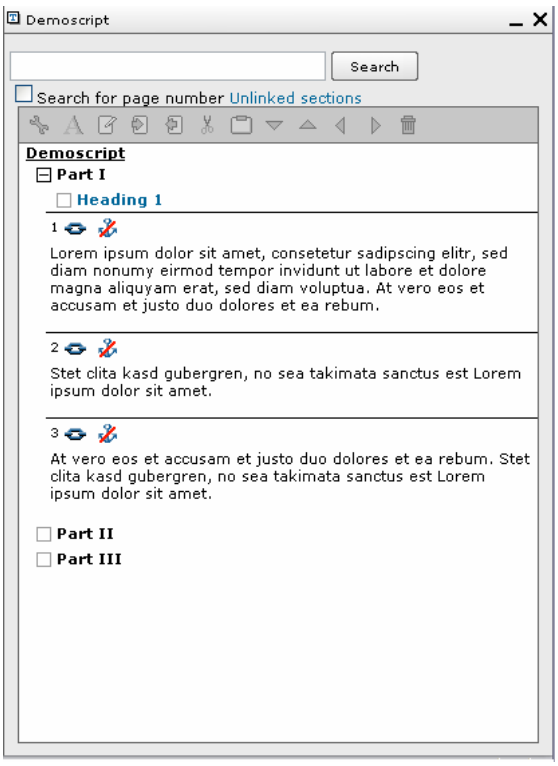
Demoscript
Search
Search for page number Unlinked sections
Demoscript
Part I
Heading 1
1
Lorem ipsum dolor sit amet, consetetur sadipscing elitr, sed diam nonumy eirmod tempor invidunt ut labore et dolore magna aliquyam erat, sed diam voluptua. At vero eos et accusam et justo duo dolores et ea rebum.
2
Stet clita kasd gubergren, no sea takimata sanctus est Lorem ipsum dolor sit amet.
3
At vero eos et accusam et justo duo dolores et ea rebum. Stet clita kasd gubergren, no sea takimata sanctus est Lorem ipsum dolor sit amet.
Part II
Part III

Fig.: A document with assigned section markings

Sections that have been marked in this way, can also be further subdivided by using the anchor. In the example above, clicking once on the anchor above "*Ut…*" would suffice to mark the two sections, "*Lorem ipsum…*" and "*Ut…*", as two separate sections that have the option to be linked. The second section up to "Heading 2" would then be able to be linked.

If you have selected more than one text section as a section that can be linked, but have not linked them, then you can quickly access these sections by using a special search function. In order to do so, click on the line labelled "Display Sections That Are Not Linked" in the sidebar.
The number of sections that are not linked in the document will now be displayed. The first section that is found will be displayed directly below. By clicking on the "In Context" link, you can directly access the position of the section in the full document.
If more than one section that is not linked has been found, then you can access the next section in the search results by clicking on the "Next Result" link.

You can also cancel the marking of a text section by clicking on the anchor icon.
After you have defined the sections of the document that you want to attribute the link option, you can then link these sections in the next step.

In order to do so, proceed as follows:

1. In the tree, navigate to the node that you want to link a text section to.
2. If this has not yet occurred, select the text section that you want to link by attributing the link option to the text section using the anchor as described above.
3. Click on the chain icon. The text section and the node are now linked.

In this way, you can link several nodes with the same text section. In order to do so, simply navigate to another node and click on the icon again.

10.6.3. Deleting Links Between Nodes and Text Sections

You can delete the link between a text section and a node at any time. In order to do so, you can either start at the node or at the text section:

1. Navigate to the node that you want to delete the link of.
2. Click on the icon at the bottom right-hand corner of the node. The linked text section will now be accessed in the sidebar.
3. Click on the icon above the beginning of the linked section; the link will now be deleted.

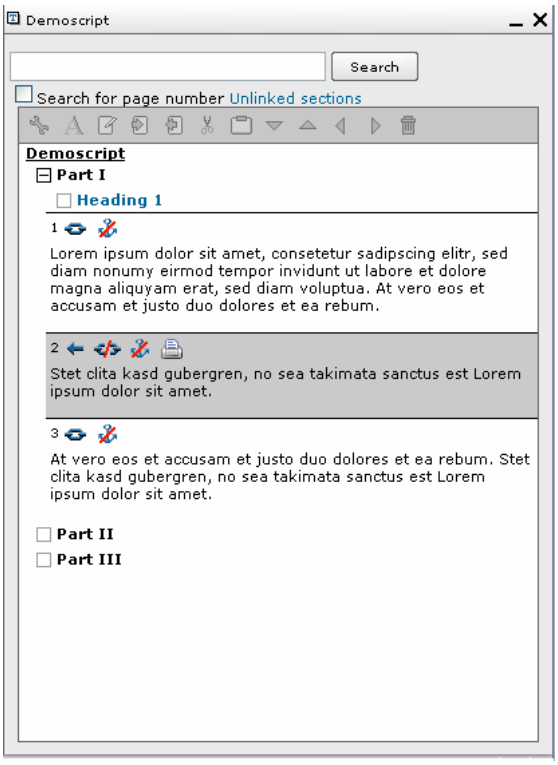
Demoscript
Search
Search for page number Unlinked sections
Demoscript
Part I
Heading 1
1
Lorem ipsum dolor sit amet, consetetur sadipscing elitr, sed diam nonumy eirmod tempor invidunt ut labore et dolore magna aliquyam erat, sed diam voluptua. At vero eos et accusam et justo duo dolores et ea rebum.
2
Stet clita kasd gubergren, no sea takimata sanctus est Lorem ipsum dolor sit amet.
3
At vero eos et accusam et justo duo dolores et ea rebum. Stet clita kasd gubergren, no sea takimata sanctus est Lorem ipsum dolor sit amet.
Part II
Part III

Fig.: A document with assigned section markings and a linked section

Alternatively, you can also delete the link starting from the document:

1. In the sidebar, navigate to the text section that you want to delete the link of.
2. Click on the icon above the beginning of the section to check which node the section is linked to.

3. If the text section is only linked to a single node, then this node will be accessed directly. Click on the icon to delete the link between the current node and the text section.
4. If the text section is linked to more than one node, then all of the linked nodes will be displayed in a new window. Click on the title of the node in this window to access the respective node. Delete the links, where applicable, by clicking on the icon. Please note that you must delete links to several nodes individually.

10.6.4. Searching In Texts

You can search in the full text of the different texts in the sidebar. The search will only be performed in the respective displayed text and not in text in another tab.
Enter your search term in the input field and click on the [Search] button.

The user has several search options:

- if two search terms are entered after each other (i.e. without an operand)
  term1 term2
  then the texts that contain both *term1* AND *term2* will be searched for
- if only a single search term is entered
  "term"
  then this exact search term will be searched for
- if only part of the search term is entered followed by an asterisk as a wild card
  *term**
  then all words that consist of "term" and any other number of characters will be searched for, e.g. "term-inal" or "term-inology"
- if the search term is entered followed directly by a question mark
  term?
  then all words that consist of "term" and precisely one more character will be searched for, e.g. "terms".

Once the search has been completed, the number of search results, as well as the first search result and its location, will be displayed. The entered search terms you will be highlighted in green in the search results and the heading of the text section in which the search result is located will also be displayed.
If there is more than one search result, then you can display the next search result by clicking on "Next Result".
Click on [Cancel] to return to the overall view of the document.

If you want to display the text within the context of the overall document, then click on "In Context". The overall document will now be opened at the position where the search result is located.

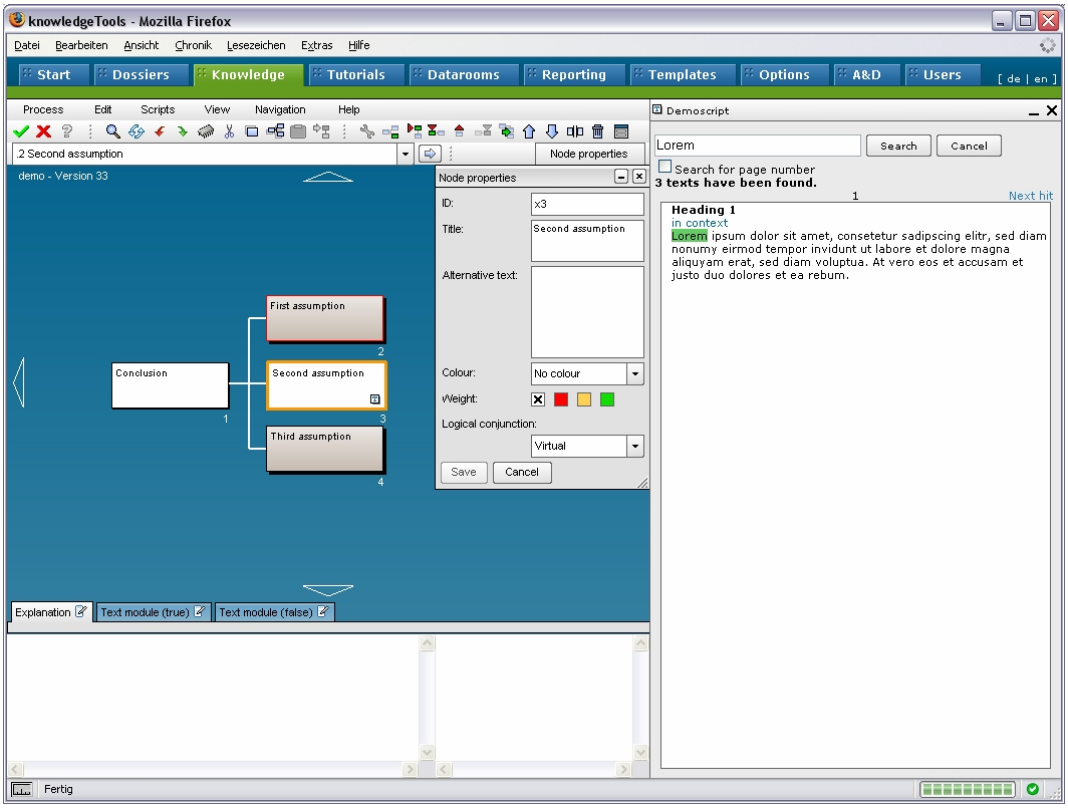

Fig.: The display of the search results in the sidebar

10.6.5. Exporting Scripts as "PDF" and "RTF" Files

You have the option to export your scripts as "PDF" or "RTF" documents for viewing and further processing in MS Word. When a script is exported, the structure of the script is also exported; therefore, when the created "PDF" document is displayed in Acrobat Reader, it already contains a table of contents. In MS Word, the section headings of the created document are assigned the format headings "Heading 1" to "Heading x".

A script may be exported at any time. If there are several scripts integrated within a tree, then click on the name of the corresponding script. Open the "Scripts" menu in the main menu and select the required export format from the two available menu options: "Create Word Document (RTF)" or "Create Print Version (PDF)". The created document will be displayed in a new browser window.

10.6.6. Deleting Scripts

NOTE: You must possess the "Tree Admin" administrative access right in order to be able to perform this task.

NOTE: Please note that the script that you want to delete may be linked in several knowledgeTools on your server! This may also be the case with knowledgeTools to which you do not have any access. Therefore, please ensure that a script is no longer required by any other users before deleting it.
In order to do so, click on the "Options" and then on "Manage Scripts". There should be a link labelled "Linked Knowledge Trees" next to the name of each script. If you click on the link next to the name of the script that you want to delete, a list of the knowledgeTools that are linked to the script that you want to delete will be displayed.

1. Click on the "**Options**" tab.
2. Please then click on "Manage Scripts".
3. An alphabetically sorted list of all the scripts that exist on your server will now be displayed. You now have the option to delete one or more scripts. In order to do so, click on the selection boxes in front of the names of the corresponding scripts.
4. Please then click on the [Delete] button at the bottom and the task window will open. In this window, the delete process will be displayed as a new task that is to be executed.
5. Please click on the icon to start the delete process. If you want to cancel the delete process, then please click on the icon.
6. After the successful deletion, the message, "Completed Successfully", will be displayed in the task window.
7. Please then click on the icon to remove the successfully completed task from the task window.

10.7. Managing Access to Scripts

Scripts are created within *a single* tree, however, they are available *throughout the entire server*, i.e. a script that has been created in a particular tree, can also be integrated in other trees and changed in those trees. Therefore, it is necessary to manage and control access to scripts.
Access management occurs in the user administration. It is possible to determine whether each individual user should be granted read or edit access to existing scripts.

NOTE: In order to access the user management, you must possess the "User Admin" administrative right.

1. Open the user administration by clicking on the "**Users**" tab.
2. Enter the name of the corresponding user or the corresponding user group in the respective search fields and click on [Search].
3. Click on the name of the user or the user group, in the search results.
4. Click on the white arrow on the right, next to "Access Rights Scripts".

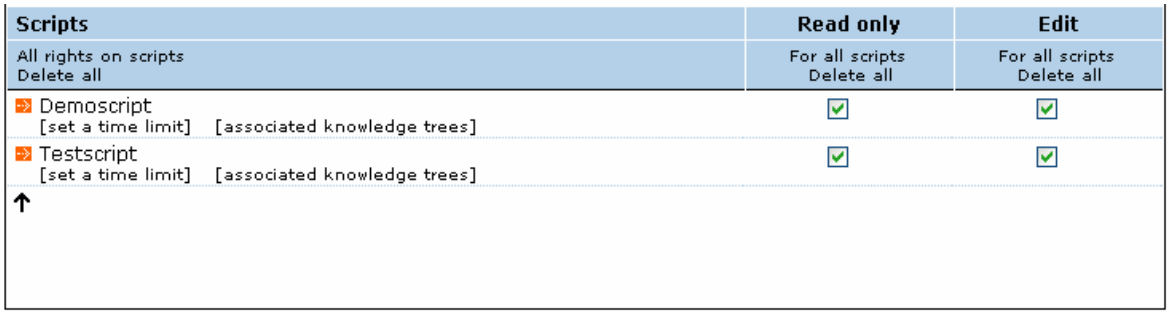

Fig.: The management of access rights to scripts

5. A list of all the existing scripts on the server will now be displayed. Two check boxes are always displayed on the right, next to the name of the script. Click on the check box in the column labelled "Read" to grant the selected user, or user group, read access to the corresponding script. In order to grant the user, or user group, the right to edit the script, *also* activate the check box in the column labelled "Edit".
6. Finish by clicking on the [Save] button.

You also have the option to grant or deny selected users, or user groups, the right to read and/or edit *all scripts*. In order to do so, simply click on either of the links, "All Script Rights" or "Remove All", on the left-hand side of the list under "Scripts".

11. The Dossier Module

The results that are achieved with knowledgeTools are saved in *processes*. It is also possible to *dynamically generate documents* on the basis of these processes.
By using the Dossier Module, you have the option to create dossiers on the server for customers or projects, to assign master data (e.g. contact details) to these dossiers and to save your results, i.e. processes and generated documents, in these dossiers. Furthermore, you also have the option to store other files, e.g. Word documents, Excel charts, presentations or graphics in the dossiers.
Besides the tiered system for the *administration of access rights*, the Dossier Module also has an *activation system.* In the default version, dossier contents are only visible to, and can only be used by, the user that created them. However, it is also possible to activate some or all dossiers for editing and processing by other users.

11.1. Configuring Dossier Administration

Data is stored in dossiers. Each dossier has a name and optionally definable master data fields. The users have the option to save additional information on the dossiers in the master data fields, e.g. contact details.
Click on the "**Options**" tab in order to determine which master data fields are available for the dossiers on your server.

NOTE: The configuration of the master data fields applies for the entire server, i.e. for all of the dossiers on your server.

The fields that are currently available in the dossiers on your server are displayed in the line labelled "*Currently Used Master Data Fields*". After the installation of the system, this line is initially empty. You can now either:

1. Select the applicable options from a list of predefined master data fields,
2. Create your own custom master data fields or
3. Select a mix of created and predefined fields.

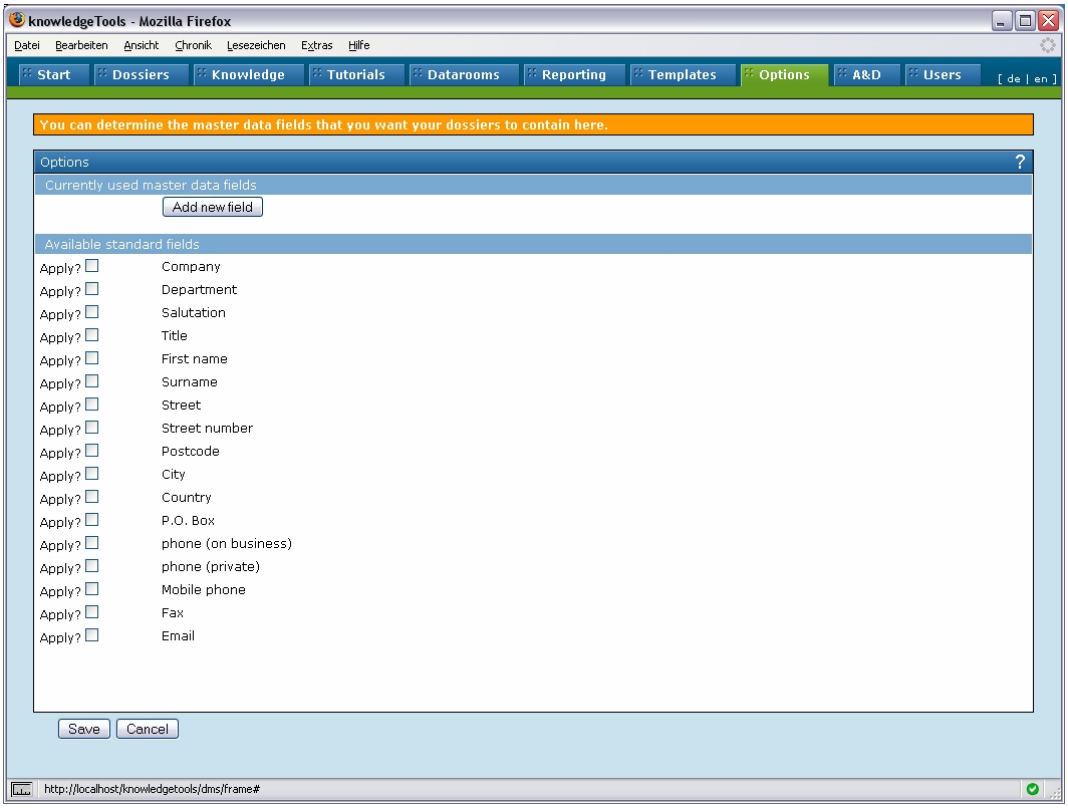

Fig.: The master data fields that are available after installation

The predefined master data fields that are applicable for the majority of applications are displayed under "*Available Standard Fields*".
In order to use one of these fields as a master data field for your dossiers, click on the check box in front of the name of the corresponding field and then click on the [Save] button at the bottom of the screen. The selected field will now be moved to the top to the "*Currently Used Master Data Fields*" section and, once it is saved, it will be available in all of the dossiers. Of course, you also have the option to select several fields at once.

In order to create your own custom master data fields, click on the button labelled [Add Custom Field]. Enter the name of the new master data field in the input field that appears. If you want to create another field of your own, click on [Add Custom Field] again. As long as you have not yet saved a created field, you can always remove it again by clicking on the [Undo] button.
Finish by clicking on [Save] to save the new master data field(s).

You also have the option to combine custom and predefined master data fields: e.g. select several predefined master data fields from the lower section of the screen and click on [Save] and then create your own custom fields as described above. You can then save these and add more predefined fields.

In order to delete a master data field that is already in use, click on the check box in front of the name of the field that you want to delete in the "*Currently Used Master Data Fields*" section and then click on the [Save] button at the bottom of the screen.

NOTE: If you delete a master data field that is already in use, then all the corresponding data on your server will be deleted!

11.2. Specifications for Creating Processes and Documents

By using the Dossier Module, you have the option to generate documents on the basis of templates and to then save these documents in a specific dossier. There are certain specifications that should be taken into consideration with regard to the creation of processes and the technical requirements for the creation of documents:

- In order to generate documents, the template, "*ktools.dot*", must be installed.
- The process templates can be used for the generation of processes.
- The appearance of generated documents can be controlled with the help of the layout templates that are part of process templates.

11.2.1. Technical Requirements

In order to generate documents when using the Dossier Module, or to access generated documents at a later stage, certain technical requirements must be met. Firstly, the basic technical requirements for generating documents, as described earlier on, must be met.
In addition, the template, "*ktools.dot*" must be installed in the template directory of all the workstations being used by the users. In order to do so, proceed as follows:

1. Open Microsoft Word on the workstation. Please note that when doing so, you should use the user's normal access and not the administrator access (unless of course the user and the administrator are one and the same person).
2. Open the "Tools" menu in Word and select "Options".
3. Click on the "File Locations" tab in the window that appears.
4. A list of file locations for different file types will be displayed. Click on the line labelled "User templates". The directory, where the Word templates of the current user are saved, will be displayed on the right, next to "User templates". Usually, the directory is:
   "*C:\Documents and Settings\User\Application Data\Microsoft\Templates*".
   Make a note of the directory; this is the user template directory.
5. The template, "*ktools.dot*" is on the installation CD of the LOGOS server console. Copy the template, "*ktools.dot*", to the user template directory.
6. The installation of the "*ktools.dot*" template is now complete.

NOTE: Depending on the configuration of your computer, the user template directory may not be visible in Windows Explorer. In this case, select "Folder Options" in the "Tools" menu in Windows Explorer and click on the "View" tab. Scroll down to "Hidden files and folders" under "Advanced settings" and activate the option, "Show hidden files and folders".
Finish by clicking on the button labelled [Apply for All Folders]. The template directory will now be visible.

11.3. Creating Layout Templates

Layout templates are a requirement for the generation of *individual* documents. They determine the information that is included in the document and the appearance of the document (layout). The following different types of information can be included in the document, e.g.:

- text modules from the tree, in which the process, that will be used as a basis for document generation was generated in;
- data from the input fields of the tree, in which the process, that will be used as a basis for document generation was generated in;
- data from the master data fields of the dossier, in which the process was generated.

The creation of layout templates is optional and only necessary if you want to manage the layout of the documents that you want to generate. If you do not create a layout template, then documents will be created with a standard template.
In order to create a layout template, proceed as follows:

1. Open Microsoft Word.
2. Create a new document (select the "New" option from the "File" menu).
3. Format the document to your requirements, e.g. by inserting a company logo or a letterhead.
4. Enter the text: [knowledgetools_document] at the position in the document where you want to insert the data from the tree (text modules and input fields data). Please note that lower-case letters and square brackets are used. This text will function as a placeholder for the data that you want to insert.
5. Save the document as a Word document (filename extension "DOC") with a name of your choice.

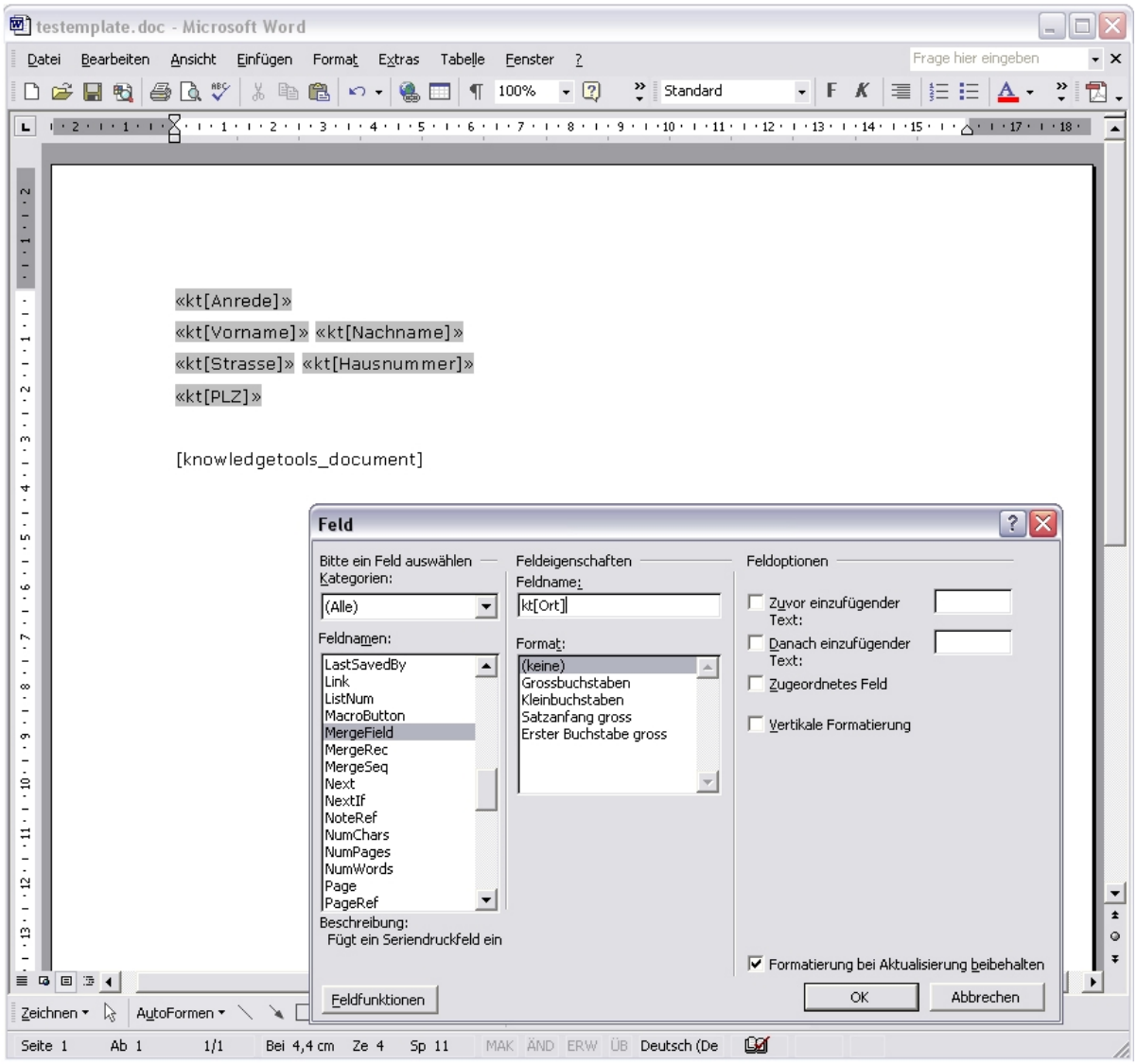

Fig.: Creating fields

In addition, you can include data from the master data fields. This is useful, for example, when you want to include contact details from a dossier such as the recipient data in a letter. In order to include data from the master data fields in the document, follow steps 1 to 4 described above and then continue as follows:

1. Click on the position in the document where you want to insert data from a master data field.
2. Open the "*Insert*" menu and select the "*Field*" option.
3. Select the "*MergeField*" option from the "*Field names*" list (see figure above).
4. Enter: kt[master data field name] in the input field labelled "*Field name*". Enter the name of the master data field that you want to take the data from under *master data field name*.
5. Click on [OK].
6. You can now enter additional placeholders of this type by repeating steps 1 to 5.

7. Finish by saving the layout template as a Word document (filename extension "DOC") with a name of your choice.

NOTE: Alternatively, you can also insert master data fields in the text modules.

The created layout template must now be added to a process template in a subsequent step.

11.4. Creating Process Templates

In order to generate processes (and documents) when using the Dossier Module, process templates are required.
In order to create a process, and documents that are based on it, the user requires the following information:

- the tree in which you want to create the process;
- the position in the tree where you want to start the creation of the process;
- the layout template that you want to use to create the document that is based on the process;
- the data that you want to use from the master data of the corresponding dossier.

It would be too complex if the users had to gather this information before the creation of every single process. Therefore, this problem is resolved by the process template, which contains all of this information. Consequently, users only require one piece of information, namely the process template from which the new process is to be created.
Process templates only have to be created once and are then available to all users that possess read access to the tree that is referred to in the template.

NOTE: In order to create process templates, you must possess the "Supervisor" global access right.

In order to create a process template, proceed as follows:

1. Click on the "**Templates**" tab.
2. If you are creating a template on the server for the first time, then you must first create the directory where you want the new template to be saved. In order to do so, click on the [New Directory] button, then enter a name for the new directory that you want to create and click on the [Create] button.
3. Enter a name for the template that you want to create in the input field. This name should be unique and significant so that subsequent users can immediately recognize the template's purpose (for example, names such as "Write Internal Memo", "Create Offer", etc.).

4. Using the "Knowledge Field" selection list, select the knowledge tree where you want to create the process based on your template. In order to do so, click on the name of the required knowledge tree in the list.
5. If you want the creation of the process to start from a specific node of the tree, then click on the [Change] button. A list with a hierarchical display of the entire tree will then be displayed. Select the node where you want the creation of the process to begin from the list, by clicking on the title of the corresponding node with the left mouse button. The path of the node will now be displayed in the input field. Click anywhere on the screen outside the list to close the list and use the entered path.
6. If you want processes that are based on your template to be used to generate documents and a specific layout template to be used when doing so, then click on the check box labelled "*Create Documents Using Type of Process*". Click on the [Browse] button, select the required layout template from the window that opens and click on [Open].
7. Finish by clicking on the [Save] button to save the template. The template will immediately be visible to all users. Users that do not possess read access to the tree that is referred to in the process template will have the template displayed as a grey disabled option and will not be able to use it.

NOTE: In order to allow users to actually use the template that you have created, ensure that the knowledge tree referred to in the template is activated for all users.

11.5. Editing Existing Process Templates

1. Click on the "**Templates**" tab.
2. Click on [Edit Existing Template]. All of the existing template folders will be displayed.
3. Click on the folder icon in front of the name of a template directory in order to open the directory. Select the template that you want to edit by clicking on the selection button in front of the name of a template.
4. Click on the [Edit] button below.
5. You can now make the following changes to the process template:
    - the name of the template,
    - the knowledge tree that is referred to,
    - the entry point and
    - the applied layout template.
6. Finish by clicking on the [Save] button to save your changes.

11.6. Deleting Existing Process Templates

1. Click on the "**Templates**" tab.
2. Click on [Edit Existing Template]. All of the existing template folders will be displayed.
3. Click on the folder icon in front of the name of a template directory in order to open the directory. Select the template that you want to delete by clicking on the selection button in front of the name of a template.
4. You can now delete the template by clicking on the [Delete] button below.

11.7. Working With Dossiers

Dossiers contain processes, files and documents that have been generated out of processes. In addition, dossiers may contain master data fields such as contact details. These allow the dossiers to be assigned to customers or projects.

11.7.1. Creating New Dossiers

1. Click on the "**Dossiers**" tab.
2. Click on [Create New Dossier] and the "New Dossier" window will appear.
3. Enter a name for the new dossier in the input field labelled "*Dossier Name*". Use a unique name so that you can easily find the dossier again at a later stage.
4. If your server is configured so that dossiers can contain master data, e.g. names, addresses, etc., then the corresponding additional input fields will also be displayed. Complete these input fields as well.
5. Finish by clicking on the [Create] button to create the new dossier.

NOTE: New dossiers are immediately visible and accessible to all of the users on your server, i.e. all of the users can see and change the name and master data of a dossier. However, the *contents* of the dossiers (processes, files, etc.) are not visible to other users.

11.7.2. Searching Existing Dossiers

You can search dossiers for the name of the dossier, the creation date and the name of the user that created the dossier. If your server is configured in a way that the dossiers contain master data fields, then you can also search in the contents of the master data fields, e.g. for a specific telephone number.

1. Click on the "**Dossiers**" tab.
2. Click on "Search Dossiers" to open the search window.

   If you want to search for a dossier by name; then enter the name in the input field labelled "Search Term" and click on the selection button labelled "Search in

Filenames".

If you want to search for the user that created the dossier, then enter the name of the user in the input field labelled "Search Term" and click on the selection button labelled "Search for Creator".

If you want to search for a dossier by using the date that it was created on, then start by clicking on the selection button labelled "Search by Date" and then select the corresponding date using the selection lists.

If you want to search in the master data fields of the dossier, then enter the search term in the input field labelled "Search Term" and click on the selection button labelled "Search in Master Data". Select the master data category that you want to search in from the selection list on the right.

3. Click on the [Search] button to start the search.

11.7.3. Editing or Deleting Existing Dossiers

You have the option to edit both the name of a dossier, as well as the contents of the master data fields.

1. Select a dossier from the list of your dossiers by clicking on the selection box in front of the name of the corresponding dossier.
2. Click on the [Edit Dossier] button. In the window that now opens, you can change all the contents that are displayed in the input fields.
3. Finish by clicking on the [OK] button to save your changes.

In order to delete a dossier, select the dossier as described above and click on the [Delete] button. You will now be asked whether you want to delete the dossier. Click on [Delete] to delete the dossier. Click on [Cancel] if you do not want to delete the dossier.

NOTE: Only empty dossiers can be deleted. Therefore, before deleting a dossier, please make sure that neither you nor any other user have any data saved in the dossier. It is possible that another user has saved data in the dossier, but has not activated it for you to use. This data will therefore not be visible to you. However, if you attempt to delete such a dossier, a message will be displayed stating the user that has saved data, which has not been activated, in the dossier.

11.7.4. Activating Dossier Contents

While dossiers are generally activated for all users, the processes and files that they contain are only visible to other users if you have explicitly activated them. However, you have the option to activate all the contents of a dossier at once for other users. In order

to do so, select a dossier by clicking on the selection box in front of the name of the corresponding dossier and then click on the [Activate] button.

11.8. Working With Processes

Processes are the central element of your work with LOGOS. Knowledge trees are *abstract* and map all the conceivable steps of a process, whereas a process is the *concrete* record of which of these steps you, as the user, have edited and how you have edited them.

Processes are saved in dossiers. Each process contains information on when the process was created, by which user and on the basis of which process template. Users have the option to dynamically generate documents on the basis of processes from the corresponding knowledge tree.

11.8.1. Creating New Processes on the Basis of Process Templates

When using the Dossier Module, the creation of processes occurs on the basis of previously created process templates. Processes are not created in the tree, but in dossiers. As a result, it is possible to assign your working results to dossiers.

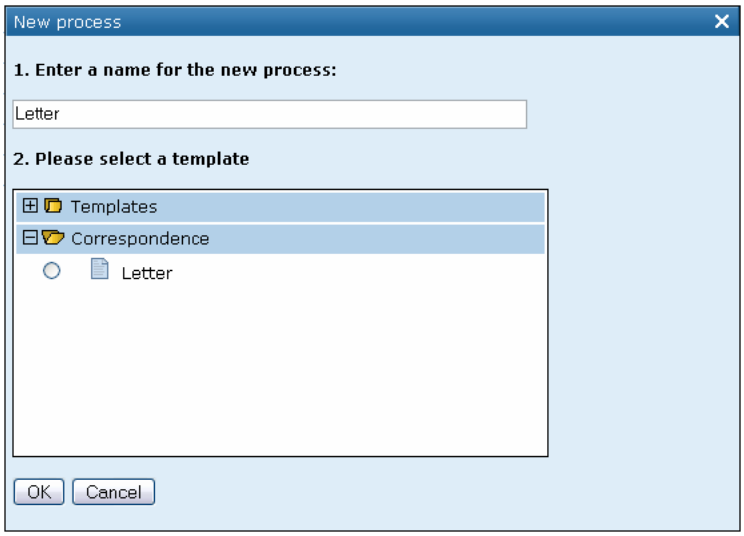

Fig.: The "New Process" window

In order to create a process, proceed as follows:

1. Click on the "**Dossiers**" tab and then on "Open Dossiers".
2. Select the dossier where you want to create the process by clicking on the name of the corresponding dossier.
3. Click on the button labelled [New Process] at the bottom of the screen and the "New Process" window will open.

4. The process templates that are available on your server will be displayed in their directories in this window. Open the required template directory by clicking on the "plus" sign in front of the name of the directory.
5. Click on the selection button in front of the name of the template that you want to base the process on. The name of the selected template will now be displayed in the upper input field. You can use this name as the name of the process or enter a name of your own into the input field.
6. Click on the [OK] button and the tree that is referred to in the process template will open.
7. You can now set the colours in the tree, enter data into input fields and/or generate documents in accordance with your own concrete working situation. Your working results will automatically be saved in the dossier where you have created the process.

11.8.2. Creating New Processes Without Process Templates

Although it is recommended to use process templates to create processes when using the Dossier Module, the users also have the opportunity to create processes without templates.

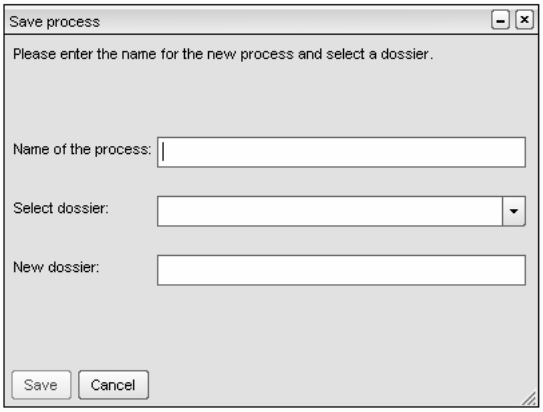

Fig.: The "Save Process" window

1. Click on the "**Knowledge**" tab.
2. Open the knowledgeTool where you want to create the process.
3. Create a process, e.g. by assigning a colour marking to a node. The "Save Process" window will then automatically open.
4. Please now enter the name that you want the process to be saved as in the input field labelled "Name of the process".
5. You can save the process in an existing dossier or create a new dossier and automatically save the process in this new dossier.

   If you want to save the process in an existing dossier, then please select the

corresponding dossier from the "Select Dossier" selection list.

If you want to save the process in a new dossier, then please enter the name of the new dossier that you want to create in the input field labelled "New Dossier".

6. Finally, click on the [Save] button and the process will then be automatically saved in the background and you will be able to continue working normally.

NOTE: Please note that when working with knowledge trees that are used to generate documents, the described method does not allow you to select a layout template for the creation of the document. In such cases, the document will be created on the basis of a standard layout template.

11.8.3. Searching for Existing Processes

You have the option to search for processes in the dossiers on your server. In this case, you can search for the name of the process, the date that it was created on and/or the name of the user that created the process.

1. Click on the "**Dossiers**" tab.
2. Click on "Search Dossiers" to open the search window.

   If you want to search for a process by using its name; then enter the name in the input field labelled "Search Term" and click on the selection button labelled "Search in Filenames".

   If you want to search for the user that created the process, then enter the name of the user in the input field labelled "Search Term" and click on the selection button labelled "Search for author".

   If you want to search for a process by using the date that it was created on, then start by clicking on the selection button labelled "Search by Date" and then select the corresponding date using the selection lists.
3. Click on the [Search] button to start the search.

All the processes that match the search criteria that you have entered will now be displayed in a flat list. The dossier that contains the process and the process template, on the basis of which the process was created, will be displayed next to each process.

11.8.4. Opening Existing Processes

Processes may exist in several versions (edited versions). In this case, the current edited version is displayed at the top of the list (see figure).

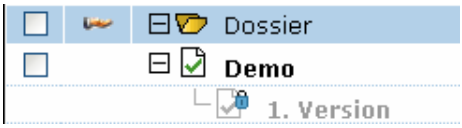

Fig.: A process with an earlier version

Earlier versions of processes are write-protected, i.e., if you click on the name of an earlier version of a process, then it will be opened in the tree; however, you will not be able to make any changes to the process.

1. Click on the "**Dossiers**" tab.
2. Click on [Open Dossier] to access a list of your dossiers. Open a dossier by clicking on the "plus" sign in front of the name of the dossier.
3. If necessary, click on the "plus" sign in front of the name of the process in order to open the earlier versions of the process.
4. Click on the name of the process to open it. The process will then be opened in the corresponding tree.

11.8.5. Editing and Versioning of Processes

You have the option to open existing processes and, in the case of copies of processes that are not write-protected, to continue editing these processes. In this way, for example, a user has the option to open and continue editing a process that was created the day before. The existing process is consequently *overwritten*.
Alternatively, you also have the option to *save* a process before you continue editing it. In order to do so, open the process and click on the icon in the toolbar. This creates a write-protected *copy* or respectively, version of the process and of the edited version that it contains.

11.8.6. Activating Processes

While dossiers are generally activated for all users, the processes and files that they contain are only visible for other users if you have explicitly activated them.

1. Click on the "**Dossiers**" tab.
2. Click on [Open Dossier] to access a list of your dossiers.
3. Open a dossier by clicking on the "plus" sign in front of the name of the dossier.
4. Select the process that you want to activate by clicking on the selection box in front of the name of the process.
5. Click on the [Activate] button below. The process, as well as any other existing versions of the process, will now be activated. In addition, the name of the process will be highlighted in red, so that you and other users will be able to quickly recognize the newly activated process.

11.8.7. Copying Processes

Processes may be copied within the same dossier. This may, for example, be useful if you have already entered a large quantity of data into a process and only want to change some of the entries without losing the entries that you have made.

1. Click on the "**Dossiers**" tab.
2. Click on [Open Dossier] to access a list of your dossiers.
3. Open the dossier by clicking on the "plus" sign in front of the name of the dossier.
4. Select the process that you want to activate by clicking on the selection box in front of the name of the process.
5. Click on the [Copy] button at the bottom.
6. Enter the name that you want to give to the copy of the process in the window that appears. Alternatively, you can also use the name that is provided by the system. In addition, by using the "Version" selection list, you can determine whether you want the last updated (editable) version of a process or an older (not editable) version of the process to be copied. If you decide to copy an older version, then it will be copied and you will be able to edit the copy, unlike with the original.

11.8.8. Deleting Processes

Click on the "**Processes**" tab and then on [Delete Process] in order to access a list of all your dossiers. Open a dossier by clicking on the "plus" sign in front of the name of the dossier. Select the process that you want to delete by clicking on the selection box in front of the name of the process and then click on the [Delete] button. You will be asked whether you want to delete the process. Click on [Delete] to delete the process. Click on [Cancel] if you do not want to delete the process.

NOTE: If you delete a process that has earlier versions and/or generated documents, then these earlier versions and documents will also be deleted.

11.9. Using the Document Generator

NOTE: Please note that the method, which is described here, only applies if the Dossier Module is installed on your server.

11.9.1. System Requirements for Creating Documents

In order to use the document generator, the following system requirements must be met by the author, as well as the user:

- **Operating system: MS Windows 2000, XP or Vista**
- **Installed Internet Explorer version 6 or later**

- **Installed Flash Player version 8 or later** (the standard *Flash Player* software can be downloaded free of charge from the following address: "*http://www.adobe.com/shockwave/download/download.cgi?P1_Prod_Version=ShockwaveFlash&promoid=BIOW"*)
- **Activated JavaScript** (The use of JavaScript must be enabled in your browser)
- **Accessing the LOGOS server** (Your workstation must be able to access the computer that the LOGOS server is installed on via http. The LOGOS server computer may also be the workstation)
- **Customized security settings** (The address ["URL"] of your LOGOS server should be entered as a "Trusted site" in Internet Explorer in order to be able to use the functions, *Document Generation* and *Create Table of Contents in Word*. The security level for the "Trusted sites" must be set at "Low".)
- **Installed Microsoft Office version 2000 or later**
- **Installed "ktools.dot" template**

In order to ensure that information can be exchanged between the knowledge tree that is displayed in Internet Explorer and Microsoft Word, it is necessary to configure the address of the computer that the LOGOS server is installed on as a "Trusted site" in Internet Explorer for each workstation and to set the security level of the zone, "Trusted sites", at "Low". In order to do so, proceed as follows:

1. Open Internet Explorer.
2. Open the "*Tools*" menu and click on "*Internet Options*".
3. Click on the "*Security*" tab.
4. Click on the "*Trusted sites*" icon.
5. Click on the "*Sites*" button.
6. Enter the address of the computer that the LOGOS server is installed on in the line labelled "Add this Web site to the zone" and add the extension "/knowledgetools/dms". After doing so, your address should read as follows: "http://address_of_the_server/knowledgetools/dms".
7. Click on the [OK] button.
8. Close the window by clicking on the [OK] button.

The management of the data exchange between the knowledge tree displayed in Internet Explorer and Microsoft Word is implemented using a Word template. This template is supplied with the installation CD; the name of the file is "*ktools.dot*".
This template must be copied to the user template directory of every workstation. In order to find the template directory, proceed as follows:

1. Open Microsoft Word.
2. Open the "*Tools*" menu.
3. Click on "*Options*" to open the "*Options*" window.
4. Click on the "File Locations" tab in the "*Options*" window.
5. A list of file locations for different file types will be displayed. Click on the line labelled "User templates". The user template directory will be displayed on the line labelled "User templates". Generally you will not see the full directory path there, but a shortened path that will look something like this "*C:\...\Application Data\Microsoft\Templates…*". In order to view the full path of the user template directory, first click on the path and then on the [Change] button in the window. The "Change Save Location" window will then open. Click on the selection list at the top of this window ("Templates" should normally be displayed in the selection list). The selection list now opens and you can see the full path to your template directory. Make a note of the directory, switch to Windows Explorer and copy the file, "*ktools.dot*", from the installation CD to the template directory.

NOTE: Depending on the configuration of the settings on your computer, the user template directory may not be visible in Windows Explorer and you will therefore not be able to copy the template file there. In order to display the directory, select "Folder Options" in the "Tools" menu in Windows Explorer. Click on the "View" tab in the window that opens and scroll down to the entry, "Hidden files and folders". If the "Show hidden files and folders" option is not enabled then please enable it. Finish by clicking on the button labelled [Apply] and close the window. The template directory will now be visible.

11.9.2. Using the Document Generator

In order to generate documents in a tree, the tree must be assigned the application type, "Document Generator", in the technical tree properties.

When using this application type it is possible to assign two text modules to each node of the tree using the logical colour marking system; one text module for cases where the node in question has been marked as "True" (green) and one text module for cases where the node has been marked as "False" (red).

In addition, these text modules may also contain *document fields* in which the user can enter certain process-related data when analysing the respective node.

The actual document "builds" itself up dynamically during the colour marking of the individual text modules. The document includes all the nodes that have been marked either red or green and possess the respective text module. Texts that are attached to

nodes that have not been marked, or marked as "Not Checked", are not included in the document.

The sequence in which the text modules are included in the document is fixed. Therefore, it is important to visualize the way in which the text modules are arranged. There are three basic rules:

1. The text modules of the parent nodes are inserted before the text modules of the respective child nodes.
2. The text modules of the child nodes are inserted from top to bottom in the document.
3. The text modules of a tree section are only inserted into the document after the text modules of the previous tree section have been inserted.

However, you have the opportunity to edit the order and the content of the text modules again before they are sent to MS Word (please refer to chapter 11.10.1).

11.9.3. Preparing the Knowledge Tree for Document Generation

Before it is possible to generate documents from a knowledgeTool, it is first necessary to create the required text modules in the Structure Editor.

1. Open the tree that you want to edit in editor mode. Please note that you must possess write access to the tree.
2. Make sure that the tree is assigned the application type, "Document Generator", in the "Technical Tree Properties" window.
3. Select the node where you want to attach one or more text modules by clicking on it once with the left mouse button.
4. At the bottom of the screen, you will see two tabs labelled "Text Module (True)" and "Text Module (False)". Select which of the two text modules you want to edit by clicking on it with the mouse and then click on the icon at the top right-hand corner of the respective tab.
5. Enter the required text and click on [Save].

11.9.4. Integrating Input Fields

The user has the option to define input fields for every single node and to integrate these in the text modules. The data which is later entered into the input fields by users is then included in the generated document. Please note that the input fields are only available at the node where they have been created and not throughout the entire tree.

The integration of input fields occurs in two steps:

1. Define the input fields that should generally be available at a node
2. Integrate one or more of these input fields in a text module of the node.

NOTE: The creation of input fields is described in chapter 7.2.

In order to integrate an input field that has already been created in a text module, proceed as follows:

1. Open the tree that you want to edit and select the node that contains the text modules where you want to integrate the input fields.
2. Select which of the two text modules you want to edit by clicking on it with the mouse and then click on the icon at the top right-hand corner of the respective tab.
3. You can now enter the text of your choice. However, this step is optional and the input fields can also be used without any additional text.
4. Click on the position in the text where you want to insert the input field with the mouse and click on the icon in the toolbar.
5. The names (labels) of all the input fields that are available for the selected node will now be displayed in the selection list that appears. In addition, the master data fields of your dossiers will also be displayed; you have the option to integrate these into the text as well (also refer to chapter 11.9.5 below).
6. Select one of the input fields by clicking on it with the mouse. The input field will now be integrated into the text.
7. Click on [Save] to save the text module.

Of course, it is also possible to insert more than one input field into a text module. In order to do so, simply repeat steps 4 and 5.

Nodes that have input fields for document generation in their text modules are indicated by the presence of a small blue icon at the bottom right-hand corner of the node. If you move the mouse pointer over this icon, then the title of the input field will be displayed. In addition, the title will be coloured green or red to display which text module the field belongs to (green = "True" or red = "False").

11.9.5. Integrating Master Data Fields

If the Dossier Module is installed on your server (see below), then you can integrate not only input fields, but also master data fields into your text modules. These (as well as the input fields) function as placeholders in the text module for the contents that are later dynamically added. In this way, you can, for example, insert the name of a contact from a file into a text module. In this case, the name that is entered under "Contact" in the file will be entered in the placeholder when the document is created. The method for integrating master data fields is the same as the method for integrating input fields.

11.9.6. Using the Sidebar

In normal mode, the document fields that exist for a node are displayed in a sidebar on the right-hand side of the screen as soon as the fields are activated by assigning the corresponding colour markings (see figure).

The sidebar opens automatically as soon as the corresponding colour marking has been set. Of course, it is also possible to open the sidebar yourself by clicking on the tab on the left-hand side of the sidebar.

The users can now enter their data in the corresponding fields and confirm the entries by clicking on the [Save] button.

Depending on how the nodes of the tree are associated with one another, it is also possible that a parent node can automatically be marked as “True” or “False” as a result of the marking of a child node. If this node also has input fields of its own, then these input fields are also displayed in the sidebar with a corresponding message.

If you want to see where in the tree the node that is associated with an input field is located, then click on [Show Node] on the right, above the input field. The tree will then be moved within the window so that the node is visible.

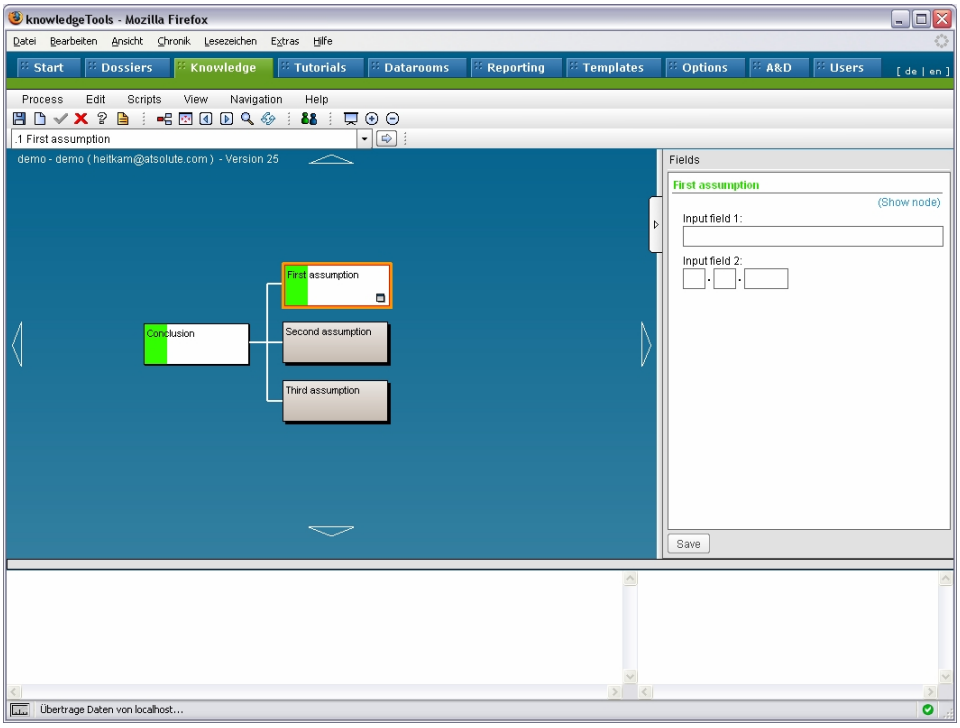

Fig.: The sidebar displays all the activated document fields of a path

11.10. Document Generation

The generation of documents occurs in normal mode (not in structure editor mode) on the basis of assigning a colour marking, i.e. a process. In order to create a document, proceed as follows:

1. Open a knowledge tree that has been prepared for document creation in normal mode.
2. Assign the colour marking, i.e. mark the node as "True" or "False" depending on your working situation. A sidebar will open on the right-hand side of the screen, in which the text modules that are associated with the node, where the colour marking has been assigned, will be displayed. This also serves as a preview of the structure of the document that is to be created.
3. Open the "Process" menu and click on "Create Document".
4. If there are layout templates on your server, then a dialog box will appear and you will be asked whether you want to create the document using a (reformatted) standard template or using one of the layout templates that already exist on the server. The layout templates will be displayed in the selection list. Select a template and then click on the [Save] button.
5. Depending on the security settings that you have configured, a pop-up window will now appear with the question, "An ActiveX control element on this page is possibly in conflict with other elements on this page. Do you want to allow this?" Click on [Yes] in the window.
6. Microsoft Word will now open and the document will be created there. If you have used a process template for the creation of the process that the document generation is based on, then this layout template will be used for the creation of the document. Otherwise, a standard template will be used. You can now edit the document according to your requirements, save it locally or print it in MS Word.

Alternatively, you can also create documents on the basis of existing processes. In order to do so, open an existing process (that belongs to a document generator knowledge tree) and then follow the steps described above from step 3 to step 5.

11.10.1. Editing Generated Documents

Generated documents can be edited in the following ways prior to exporting/publishing then in Microsoft Word.

The individual text modules of the document can be

- edited with regard to content
- deleted
- moved

or new own text modules can be added.

As described above, the text modules of nodes, which have been marked as "True" or "False" during the assigning of the colour marking, are added and listed under each other in the sidebar on the right-hand side of the screen.

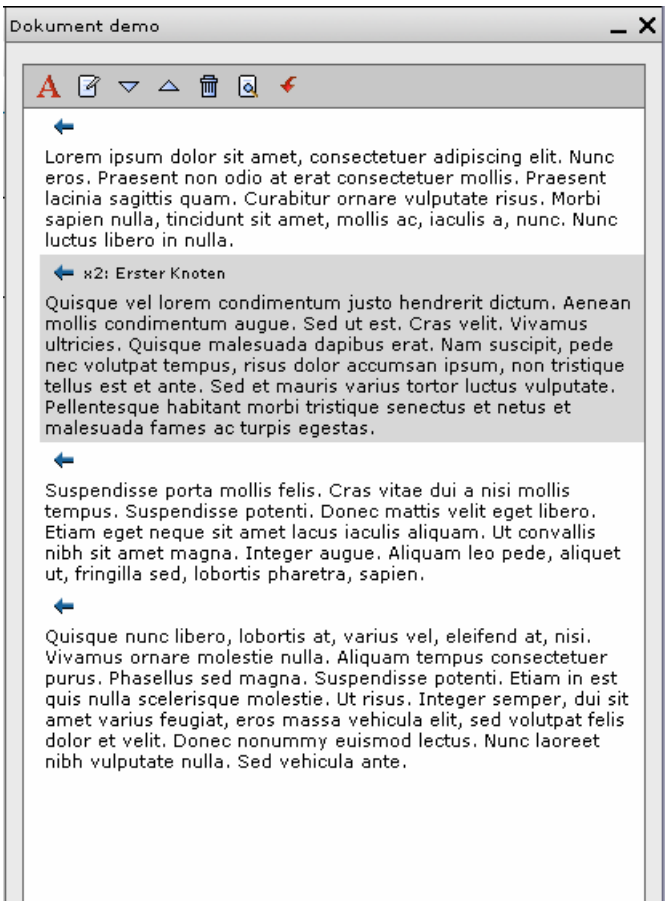
Dokument demo
Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Nunc eros. Praesent non odio at erat consectetuer mollis. Praesent lacinia sagittis quam. Curabitur ornare vulputate risus. Morbi sapien nulla, tincidunt sit amet, mollis ac, iaculis a, nunc. Nunc luctus libero in nulla.
x2: Erster Knoten
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Fig.: The dynamically created document in the sidebar

A blue arrow is displayed above every text module. If you touch this arrow with the mouse, then the node that the text module belongs to is displayed. The display occurs in the following form: [*Node ID: Node Title*]. If you click on the arrow, then the corresponding node is accessed on the left in the knowledge tree.

NOTE: Changes that are made to text modules are saved in the updated process and can therefore be accessed at any time. However, the changes do *not* have an effect on the original text modules of the knowledge tree.

Moving Text Blocks

Text blocks can be moved up or down by one position within the document.

In order to do so, select the text block that you want to move by clicking on it with the mouse (the text block will then be marked in grey) and then click on the or icons to move the text block up or down.

Editing Text Modules

Select the text module that you want to edit by clicking on it once with the mouse and then click on the icon. An editing window will open. Edit the text as required and then click on the [Save] to apply your changes. Please note that these changes will only have an effect on the text module in the document draft in the sidebar. The original text of the text module in the knowledge tree will remain unchanged.

Text modules that have been edited in this way will be marked accordingly. The note "*adapted*" will be displayed on the right of the icon on the first line of the text module.

You also have the option to undo changes to the text modules. In order to do so, select the text module in question by clicking on it with the mouse and then click on the icon in the sidebar.

The "Versions" window will now open on the left-hand side of the screen. All the edited versions of the text module will be displayed in the window. Select an edited version by clicking on the button labelled [Use This Version]. This version will now again be displayed in the sidebar on the right-hand side of the screen.

Inserting New Text Modules

In addition to the text modules that have been integrated in the document as a result of the colour marking being assigned, you can also insert your own text modules.

1. In order to do so, select the text module in the sidebar under which the new text module should be inserted and click on the icon.
2. A new empty line will appear with the icon at the beginning of the line. Select the line by clicking on it with the mouse and then click on the icon to enter the actual text.
3. The text editor will now open on the left. Enter a text and click on [Save] to save your entries.

Please note that text modules that are added in this way are not linked to a node of the knowledge tree.

Deleting Text Modules

Select the text module that you want to delete by clicking on it with the mouse and then click on the icon. Please note that the text module is only deleted from the document draft in the sidebar. The original text module remains in the knowledge tree.

If a text module has been deleted, then an empty line is displayed instead of the text module with the icon at the front of the line. The note "*removed*" will be displayed on the right-hand side of the icon.

In order to recover the deleted text module, first click once on the corresponding line and then click on the icon. The "Versions" window will now open on the left-hand side. Select one of the displayed versions of the text module by clicking on the button labelled [Use This Version].
The text module will now again be displayed on the right-hand side.

Show Preview

Click on the icon to show the preview of the document without separated text modules and icons in the text.

11.10.2. Saving and Accessing Generated Documents in Dossiers

Once a document has been generated, you have the option to save the document conventionally on your local PC or network. However, you also have the option to save the generated document in the dossier in which you created the process that the document belongs to.
In order to do so, do not save the document in the usual way, but click on the [Upload & Close] button in the Word toolbar (see figure).

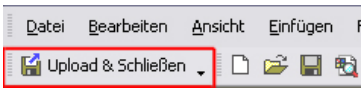


Fig.: The [Upload & Close] button

Microsoft Word will now close and the document will be saved in the associated dossier. In addition, a write-protected copy of the process will also be created and saved under the original process (see figure) with a version number. This makes it possible to:

- later understand which entries in the tree the generation of the document was based on; and
- again generate the exact same document from this write-protected copy.

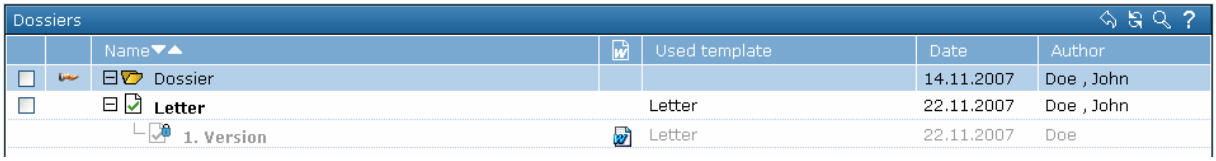


Fig.: A process with an associated document

A Word icon is displayed next to the write-protected copy of the process. This icon indicates that there is a document that belongs to the copy of the process. If you click on the icon, the generated document will be opened in Microsoft Word.

11.11. Working With Files

When using LOGOS, you have the option to upload files from your personal PC or your network to a dossier. These files may contain, e.g. scanned correspondence, Excel charts, presentations, videos or graphics.

11.11.1. Adding New Files to Dossiers

1. Click on the "**Dossiers**" tab.
2. Click on [Open Dossier] to access a list of your dossiers.
3. Select the dossier that you want to add the file to by clicking on the name of the dossier.
4. Click on the [New File] button.
5. Click on the [Browse] button in the window that opens.
6. In the next window, navigate to the file that you want to upload, select it by clicking on it with the mouse and then click on [Open].
7. Click on the [Upload] button to upload the file.

11.11.2. Searching for Existing Files

You have the option to search for files using the name of the file, the date that the file was uploaded or the name of the user that uploaded the file:

1. Click on the "**Dossiers**" tab.
2. Click on "Search Dossiers" to open the search window.
   If you want to search for a file by name; then enter the name in the input field labelled "Search Term" and click on the selection button labelled "Search in Filenames".
   If you want to search for the user that uploaded the file; then enter the name in the input field labelled "Search Term" and click on the selection button labelled "Search for Creator".
   If you want to search for a file by the date that it was uploaded; then start by clicking on the selection button labelled "Search by Date" and then select the corresponding date using the selection lists.
3. Click on the [Search] button to start the search.

All the files that match the search criteria that you have entered will now be displayed in a flat list. The dossier that contains the file will be displayed next to each file.

11.11.3. Activating Files

While dossiers are generally activated for all users, the files that they contain are only visible to other users if you have explicitly activated them.

1. Click on the "**Dossiers**" tab.
2. Click on [Open dossier] to access a list of your dossiers.
3. Open a dossier by clicking on the "plus" sign in front of the name of the dossier. Select the file that you want to activate by clicking on the selection box in front of the name of the file.
4. Click on the [Clear] button below to activate the file. In addition, the name of the file will be highlighted in red, so that you and other users will be able to quickly recognize the newly activated file.

11.11.4. Deleting Files

1. Click on the "**Dossiers**" tab.
2. Click on [Delete Dossier] to access a list of your dossiers.
3. Open a dossier by clicking on the "plus" sign in front of the name of the dossier. Select the file that you want to delete by clicking on the selection box in front of the name of the file.
4. Click on the [Delete] button below. Before deletion, you will be asked to confirm whether you want to delete the file. Click on [Delete] to delete the file. Click on [Cancel] if you do not want to delete the file.

11.12. Dossier Notes

Besides processes and files, you also have the option to create and save text-based notes in dossiers. The same conditions apply for these notes as for processes and files, i.e. notes are initially private and are only visible to the user that created the note. However, notes can also be activated for all users.

11.12.1. Creating New Notes

Notes are always part of a dossier. Therefore, before creating a note, it is first necessary to select the dossier that you want the note to be assigned to.

1. Click on the "**Dossiers**" tab.
2. Click on [Open Dossiers].
3. Click on the dossier that you want to add the note to.
4. Click on the [New Note] button at the bottom of the screen.
5. In the "Note" window that opens, enter a name for the note, followed by the text of the note below it.
6. Finish by clicking on [Save].

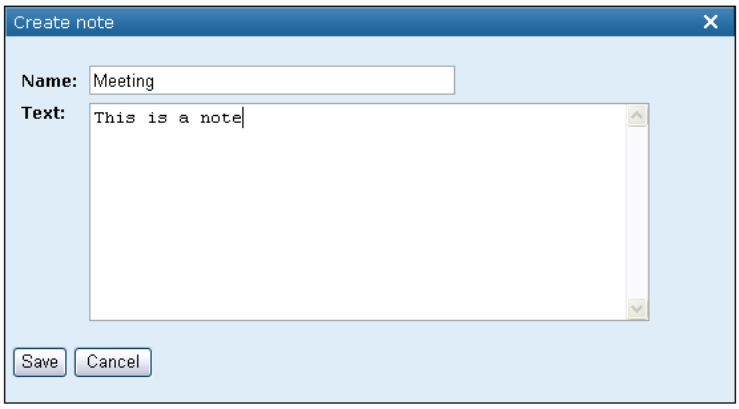


Fig.: The "Note" window

11.12.2. Opening and Editing Existing Notes

Notes in dossiers are indicated by presence of the icon. Click on the name of a note to open it. You can change the name and content of a note at any time by editing the text that is displayed in the two input fields. Click on the [Save] button to apply your changes.

11.12.3. Activating Notes

While dossiers are generally activated for all users, the files that they contain are only visible to other users if you have explicitly activated them.

1. Click on the "**Dossiers**" tab.
2. Click on [Open Dossier] to access a list of your dossiers.
3. Open a dossier by clicking on the "plus" sign in front of the name of the dossier. Select the note that you want to activate by clicking on the selection box in front of the name of the note.
4. Click on the [Clear] button below to activate the note. In addition, the name of the note will be highlighted in red, so that you and other users will be able to quickly recognize the newly activated note.

11.12.4. Deleting Notes

1. Click on the "**Dossiers**" tab.
2. Click on [Open Dossier] to access a list of your dossiers.
3. Open a dossier by clicking on the "plus" sign in front of the name of the dossier. Select the note that you want to delete by clicking on the selection box in front of the name of the note.
4. Click on the [Delete] button below. Before deletion, you will be asked to confirm whether you want to delete the note. Click on [Delete] to delete the note. Click on [Cancel] if you do not want to delete the note.

12. Risk Analysis Using knowledgeTools

knowledgeTools that have the application type, "Risk Analysis", activated, allow users to calculate the probabilities of occurrence of the events that are illustrated in the node in accordance with the logical structure. Nodes (or respectively, the events that are represented by the nodes) can no longer only be marked as "True" or "False", but may now alternatively be assigned a probability of occurrence between 0% and 100%, which can be used in the calculation of the overall probability of occurrence.
Each individual node may also optionally have a value in EUR (€), USD ($) or GBP (£). The expected value for the node is calculated in accordance with the probability of occurrence of the corresponding node.
In order to use the Risk Analysis Module, you require the corresponding licence on your LOGOS server.

12.1. Using Risk Analysis in knowledgeTools

In order to use the risk analysis functions in a knowledgeTool, the application type, "Risk Analysis", must first be activated for the corresponding tree in the technical tree properties:

1. Open the knowledgeTool. Please note that in order to perform this operation, you must possess the right to edit the knowledge.
2. Open the "Navigation" menu and select the option: "Open Technical Tree Properties".
3. Select the "Risk Analysis" option from the "Application Type" selection list.
4. You now have the option to determine whether the expected values should also be calculated in the tree. In order to do so, select the check box labelled "Expected Values". Select the currency that you want the expected values to be calculated in from the selection list behind it.
5. Click on [Save] and a new window will open, in which you will be informed that the client must now reload. Please confirm this by clicking on [Reload].

12.2. Entering Probabilities

When you open a knowledgeTool that has the application type, "Risk Analysis", activated, for the first time, all the nodes initially have a probability of occurrence between 0% and 100%, as a more accurate statement regarding the probability of occurrence for the individual node has not yet been made. The node is therefore in the state of the greatest possible uncertainty. This status is displayed by an orange coloured bar on the left-hand side of the node.

If you move the mouse pointer over the icon in the bottom left-hand corner of a node, then the current probability of occurrence of the events that are illustrated in the node, will be displayed in a tooltip (see figure).

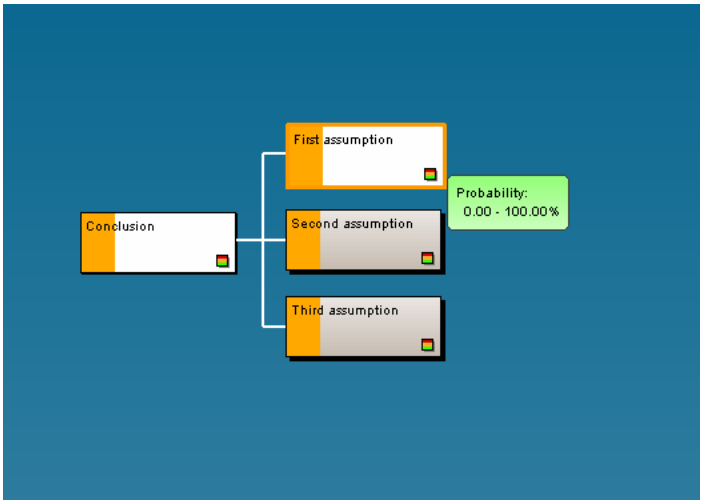


Fig.: A tooltip displaying the current probability of occurrence

Nodes can be given an *exact* probability of occurrence or a *range* of possible probabilities of occurrence. Consequently, the following values are possible:

- a value of 0 per cent
- a value of 100 per cent
- a value between 0 per cent and 100 per cent (e.g. 65%)
- a range between one selected value and another selected value between 0 per cent and 100 per cent (e.g. 20% to 30%)

Thereby, a value of 0 per cent is equivalent to the node being marked as "False" and a value of 100 per cent is equivalent to the node being marked as "True".

The user therefore also has the option to mark nodes using the usual method, as "True" or "False", by clicking on the corresponding node and then marking it by clicking on the or icons in the toolbar or by selecting the corresponding options in the "Process" menu or shortcut menu. Depending on whether you have marked the node as "True" or "False", the node will now have a probability of occurrence of 100% or 0%.

The entry of a probability of occurrence in a node *automatically* generates a *process*, which can then be accessed again at a later time.

In order to enter a probability of occurrence of 100% or 0% for a node, click on the icon and a window with two slider controls will open at the node (see next figure).

The position of the upper slider control determines the minimum probability of occurrence, and the position of the lower slider control determines the maximum probability of occurrence.

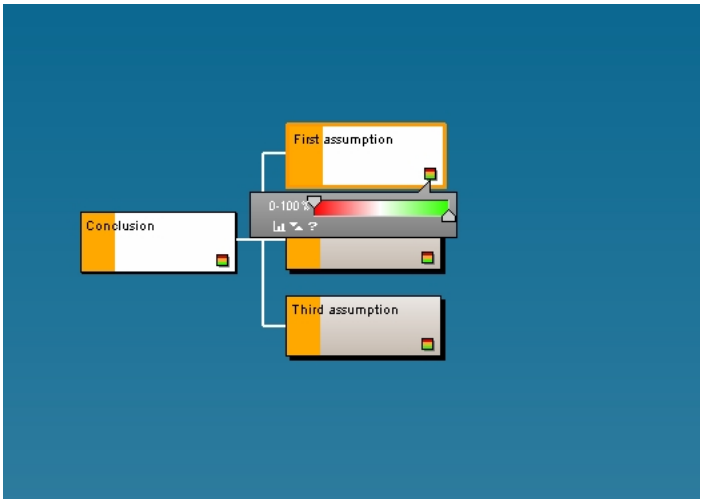


Fig.: The slider controls for entering the probability of occurrence

Both slider controls can be moved independently from each other in the window with the mouse. In order to do so, click on the corresponding slider control with the left mouse button and keep the mouse button pressed while you move the slider control. The current probability of occurrence is displayed on the left of the node next to the red-green area. If you move both slider controls, then you will see how the values change.

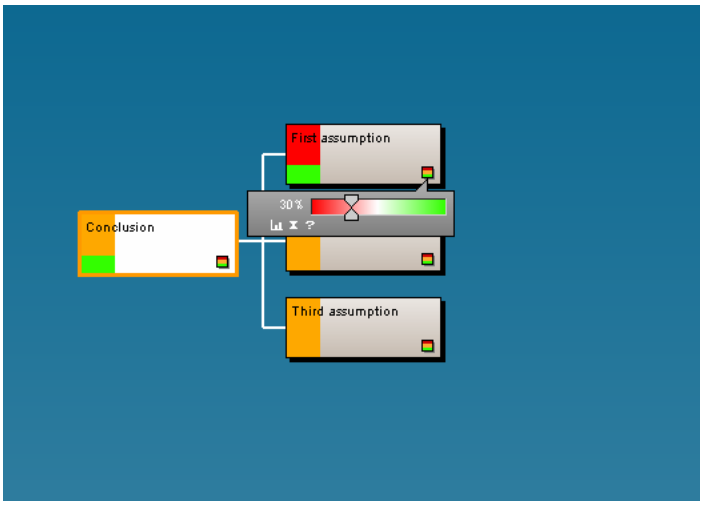


Fig.: A node with a set probability of occurrence

By moving both slider controls, you can enter a range of possible values (in this example, the range is from 60% to 90%). You can also enter an *exact* value.

You also have the option to set the two slider controls so that they can be moved together. In order to do so, click on the red-green area between the two slider controls and both slider controls will then be fixed. Alternatively, you can also click on the centre icon (⧗) of the three icons on the left-hand side of the window.

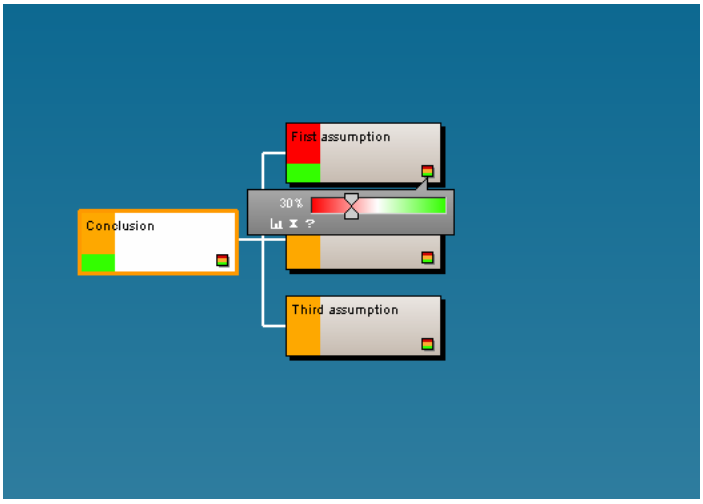


Fig.: The input window with fixed slider controls

If the upper and lower triangles of the icon are aligned (⧗), then the slider controls are fixed. If you click on the icon again, then the fix will be cancelled.

The probability of occurrence that is entered in the window will be displayed by the coloured bar on the left-hand side of the node. When you enter a probability, you will be able to see how the corresponding bar of the parent node changes.

NOTE: Please note that probabilities of occurrence in trees can only be set from right to left. This also means that it is no longer possible to enter probabilities of occurrence at child nodes if a value has already been set at the parent node.

In order to reset an entry that has been made, please click on the ? icon. The node will then be reset to a probability of occurrence between 0% and 100%. Alternatively, you also have the option to click on the node with the right mouse button and select the "Not Checked" option from the shortcut menu.
In order to close the input window for probabilities of occurrence, simply click on the ▪ icon again.

12.3. Using Expected Values

The user not only has the option to enter and calculate the probability of occurrence at the node, but also values and expected values – i.e., an event that is illustrated in a particular node can represent a specific (monetary) value and the probability of occurrence of the event can then be used as a basis to calculate the probability with which a particular value can actually be realized.

In order to use this function, the "Expected Values" option must be activated in the technical tree properties and you must also select the currency in which you would like to enter and have the expected values calculated in. You have the option to choose between the euro, the US dollar and the pound sterling.

In order to enter a value at a node, open the input window for entering the probability of occurrence by clicking on the ■ icon.

Next, click on the ▼ icon at the bottom left-hand corner of the window. The window will then be enlarged and three additional fields will be displayed: "Value", "E_{min}" and "E_{max}".

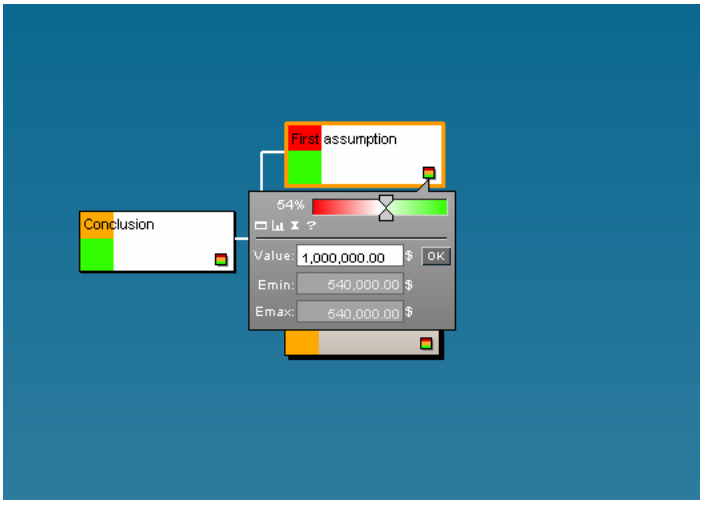


Fig.: The input window with value and expected value(s) fields

Enter a figure in the input field labelled "Value" and then click on the [OK] button on the right.

NOTE: After you confirm your entry by clicking on the [OK] button, the value that you have entered will be used for the calculations.

The expected value that has been calculated from the probability of occurrence of the node and the entered value will now be displayed in the fields "E_{min}" and "E_{max}".

The expected value is the product of the probability of occurrence and the value.

If you have previously entered an exact probability of occurrence (e.g. 60%), then the values for E_{min} and E_{max} are identical. If you have entered a range of possible probabilities of occurrence (e.g. 60% to 90%), then;

- the minimum expected value, E_{min} is calculated from the product of the value and the minimum probability of occurrence P_{min} (therefore 60%)
- the maximum expected value, E_{max} is calculated from the product of the value and the maximum probability of occurrence P_{max} (therefore 90%).

The entered values and the calculated expected values, as well as the probabilities of occurrence, are saved in a process.

If you want to minimize the window again and hide the display of the values and expected values, then click on the ▭ icon.

If you move the mouse pointer over the ▪ icon at the node in question, all the probabilities, values and expected values that have been entered and calculated at the node are displayed.

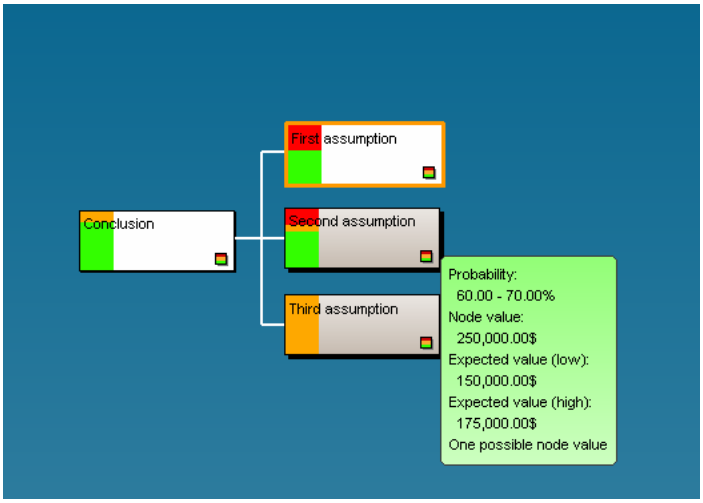


Fig.: The display of all the values of a node

The first two lines display the probability of occurrence of the node event. This value may lie between 0% and 100%.

The value that has been entered by the user for the node event is displayed under the node value. The minimum and maximum expected values are calculated from the probability of occurrence and the entered value. The last line displays the number of expected values that may result on the basis of the entered and calculated values at the node.

The "Probability distribution" window can be accessed by clicking on the ▙ icon in the input window for entering values and probabilities.

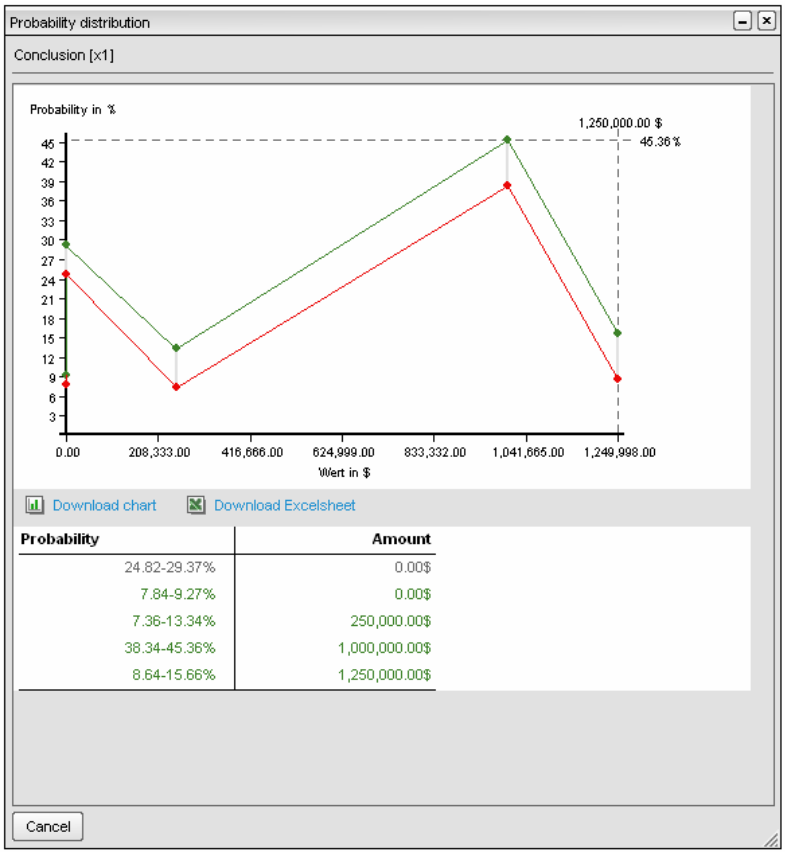


Fig.: A display of the distribution of probability

The "Probability distribution" window shows,

- which amounts (expected values) can be realized
- with which probability (probability of occurrence)

at the selected node in a graphical and tabular display.

The highest expected value is always marked by a dotted line and displayed above the line; the highest probability of occurrence is illustrated by a horizontal line and displayed on the right next to line.

The individual value combinations are illustrated by dots. These dots are connected by a line. The line merely serves to provide a better understanding of the trends; the line does *not* mean that there are further values in between the individual dots. If you move the mouse pointer over the individual dots in the diagram, then the exact values (probability of occurrence and expected value) that are represented by the dots are displayed.

You have the option to download the diagram as a chart in "PNG" format (e.g. in order to integrate in a presentation). In order to do so, click on the icon.

The exact values are displayed in tabular form under the diagram.

The first line of the table displays the probability with which the expected value 0 (e.g. 0 EUR) will be realized in a grey font. Below it, the probability with which values above 0 will be realized is displayed in a green font. You have the option to download the values that are illustrated in the table as an MS Excel file. In order to do so, click on the icon.

12.4. Additional Functions

In knowledgeTools that have been assigned the application type, "Risk Analysis", there are various dependencies between the options in the technical tree properties of the knowledgeTool and the entry and calculation of probabilities of occurrence.

Strict colors

If the force colour marking option is activated, then the user can only enter a probability of occurrence at the child node and not at the parent node.

Bivalent Logic

The "Two-Valued Logic" option cannot be activated in knowledgeTools that have been assigned the application type, "Risk Analysis".

Suppress Display of Computed Data

If this option has been activated, then the probabilities of occurrence in the tree are still calculated from right to left; however, the display of the calculated probability of occurrence at the parent node is suppressed.

Additional Functions When Using the Dossier Module

If the Dossier Module is activated on your server, then your processes are saved and displayed in a dossier. In this case, additional information is supplied when viewing the dossier, if the processes have been created within the framework of a risk analysis.

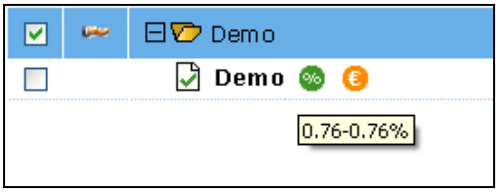


Fig.: The display of a risk analysis process

In this case, the icon appears on the right next to the name of the process if there is a calculated probability at the start node of the corresponding knowledgeTool. If there is

also a calculated expected value at the start node, then the icon will also be displayed.
If you move the mouse pointer over the icon, then the corresponding exact value will be displayed in a tooltip (see figure above).

Additional Analysis Options

If the knowledgeTool has the application type, "Risk Analysis", activated, then additional analysis functions are available. These are described later on in the chapter on "Using Statistics".

13. Using the Calculator Module with knowledgeTools

The calculator module allows the user to perform calculations within a knowledge tree on the basis of predefined calculation formulas. In addition, the user also has the option to attach fields that can contain numerical values or formulas to the nodes of a tree.
The calculation occurs within a process, irrespective of the logic of the knowledge tree or the logical marking ("True", "False" or "Not Checked") of the node of a tree. The entered numerical values and calculation results are saved within a process and can be exported to MS Excel. The entered and calculated numerical values are treated as double precision floating point numbers.
In order to use the Calculator Module, you require the corresponding licence on your LOGOS server.

13.1. Configuring Calculations – Creating Formula Fields

In order to enter numerical values for calculations in a knowledgeTool, you must first define calculation fields at the corresponding node of the tree in structure editor mode. These calculation fields can then later be used to enter values or output calculation results in normal mode. In order to perform calculations, you require:

- at least one field to enter a numerical value and
- at least one field that contains a formula that is referenced to the input field and can be used for calculations with the value that is later entered in the other field.

In order to create calculation fields, you must configure knowledgeTools trees for the use of calculation fields. It is only necessary to perform this action once. In order to do so, proceed as follows:

1. Open the tree in structure editor mode.
2. Open the "Navigation" menu and select the "Technical Tree Properties" option.
3. Click on the check box labelled "Calculation Fields".
4. Click on the [Save] button.
5. The "Technical Tree Properties" window will now close. Click on the [Reload] button to reload the client and the sidebar for entering calculation fields will be displayed on the right-hand side of the screen.

Calculation fields always belong to a *single* specific node, i.e. they do not depend on the path. Therefore, for example, it is also possible for a value that has been entered *once* in a field of a node that appears *multiple* times in a tree, to also be available in all instances of the node (i.e. all nodes with the same ID).

Start by selecting the node that you want to create the calculation field at and then click on the icon to create a new calculation field (In this way, you can create as many calculation fields as you want at the node).
Calculation fields have a unique name that cannot be changed. The illustration below contains three calculation fields; they are named A2, B2 and C2. By using these unique names, the field can be referenced in other calculation fields. The name always consists of an upper-case letter and a number. Thereby, the number corresponds to *the ID of the node* where the field was created. Therefore, all the calculation fields of a node have the same number in their name. The upper-case letter is used to differentiate between the individual calculation fields of a node.

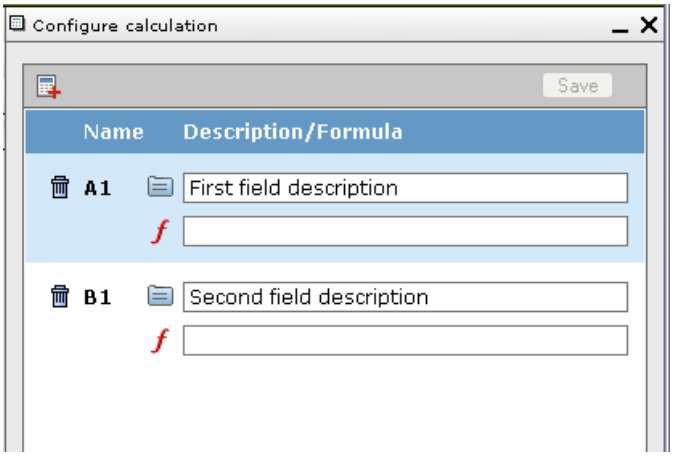


Fig.: The sidebar with calculation fields in structure editor mode

Each calculation field has two input fields:

- The "Description" field is identified by the icon and allows knowledgeTools users to enter a brief description of the field content. This could be a description such as, e.g. "Cost in EUR".
- The "Formula" field is identified by the *f* icon and can be used either to enter numerical values or to enter formulas. If the field is left empty, then users can enter numerical values in the field in the published version of the knowledgeTool, which can then be used for additional calculations. Alternatively, you can also enter a formula in the field (Please refer to the calculation operations and functions further on in the User's Manual).
  If this is the case, then users will not be able to enter anything in the field in the published version of the knowledgeTool and the field will be used solely to output the result of the calculation formula.

In order to save a formula field that you have created, as well as the contents of the "Description" and "Formula" fields, click on the [Save] button at the top right-hand corner of the sidebar.

Click on the icon to create another new formula field or click on the icon in front of the name of the formula field to delete it.

13.2. Possible Calculation Operations and Functions

In structure editor mode, you can enter formulas and numerical values in fields, as well as field names of other fields, that can be used in subsequent calculations. You are allowed to use brackets in the formulas.

13.2.1. Numerical Values

Numerical values can be entered as follows:

- 123
- -123
- 123.00 (decimal point)

13.2.2. Field Names

Calculation fields (of the actual node or another node) can be included in a calculation by stating the field name.

Example: *A1+B2* (adds the entered numerical value in field A1 to the entered numerical value field B2)

13.2.3. Possible Calculation Operations and Notation

The following calculation operations are currently available: addition, subtraction, multiplication and division. These operations can be used in formula fields with the following notation:

- *subformula+subformula* (addition)
- *subformula–subformula* (subtraction)
- *subformula*subformula* (multiplication)
- *subformula/subformula* (division)

Example: *A1*10* (multiplies the numerical value entered in the field A1 by 10)

NOTES

- Operands and operators cannot be separated by a space.
- Multiplication and division have a higher precedence than addition and subtraction.
- The operators are left-associative, i.e. *A op B op C op D* is interpreted as *((A op B) op C) op D)*. For example: *A–B+C+D=((A–B)+C)+D*

13.2.4. Functions

In addition to the above-mentioned calculation operations, you also have the option to use the following functions:

- *max()*
- *min()*
- *sqrt()*
- *log()*
- *sin()*
- *cos()*
- *tan()*
- *sinh()*
- *expt()*
- *cosh()*
- *tanh()*
- *asin()*
- *acos()*
- *atan()*
- *asinh()*
- *acosh()*
- *atanh()*
- *abs()*
- *floor()*
- *ceiling()*
- *truncate()*
- *round()*

Multiple arguments are always separated by a semicolon.
Example: *max(argument1;argument2)*

13.3. Performing Calculations

Whereas the calculation fields are created in structure editor mode, the actual calculation occurs in normal mode within the process.
If you open a tree that has been configured for calculations as described above, then a sidebar will appear on the right-hand side of the screen in which all the calculation fields that are contained in the tree will be displayed (please refer to the next illustration).
The line that is highlighted in blue always displays the ID and title of the node that contains the calculation fields that are listed below it. In order to display the corresponding node in the tree, click on the blue arrow on the left of the node title.
The name of the field (e.g. A1) is displayed next to the input field.
If the calculation field is used to output a calculation result, then the formula will be displayed in grey below the field. The background colour of the field is also grey. It is not possible to manually enter any values in such a field; the field is only used to *output* calculation results.
If a description has been entered for the field, then it will be displayed below the field in a black font.

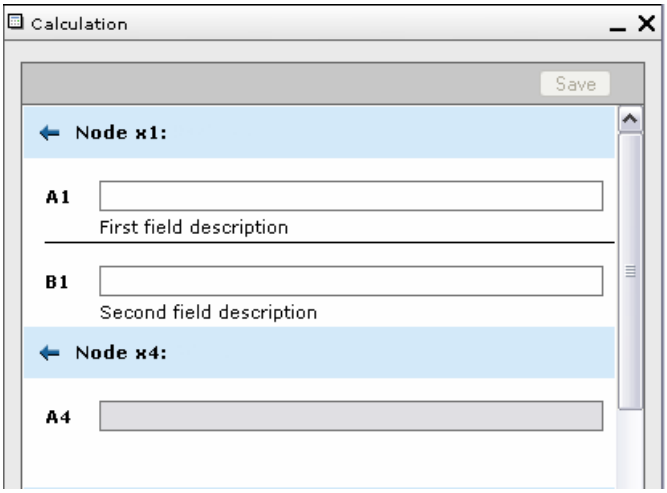


Fig.: The sidebar with calculation fields in normal mode

If multiple calculation fields have been created at a node, then these are displayed separated by a horizontal black line.
Nodes in a knowledge tree that contain one or more calculation fields are indicated by the presence of the ❏ icon. The user can click on the icon in the node in order to quickly access these input fields. The node title that belongs to the input fields will be highlighted in orange in the sidebar.

Enter the corresponding numerical values for your working situation in the input fields in the sidebar. The calculations will be performed as soon as you click on the [Save] button in the top right-hand corner of the sidebar. At the same time, the entered numerical values and the calculation results will be saved as a process.

NOTE: If you are using the Dossier Module and working without a process template, then when you click on the [Save] button you will be asked to state the name that you want to save the process under and the dossier that you want to save it in (please refer to chapter 11.8.2).

13.4. Exporting Entered Values and Calculation Results

The numerical values that are entered in the fields, as well as the calculation results, are saved as a process and can then always be accessed again. In addition, numerical values and calculation results can be exported as an MS Excel file. In order to do so, open the "Process" menu and select the "Export Process Data" option. In the dialog box that opens, select whether you want to open the XLS file or save it to your local hard drive.

NOTE: The result of colour markings that have been assigned within a process and the entered and calculated numerical values are displayed in two separate worksheets in the MS Excel file.

14. The Tutorial Module

If the Tutorial Module is installed on your LOGOS server, then you have the option to create video-based tutorials. By using these tutorials, you can link the videos that you create to a knowledgeTool. You can then access and set the markings of nodes as "True" or "False" with the help of the time-controlled script of the tutorial. In addition, you have the option to display individual PowerPoint slides (which have previously been converted to "SWF" format) in the video.

These tutorials can be used, e.g. as a teaching tool or to publish virtual "tours" through a tree.

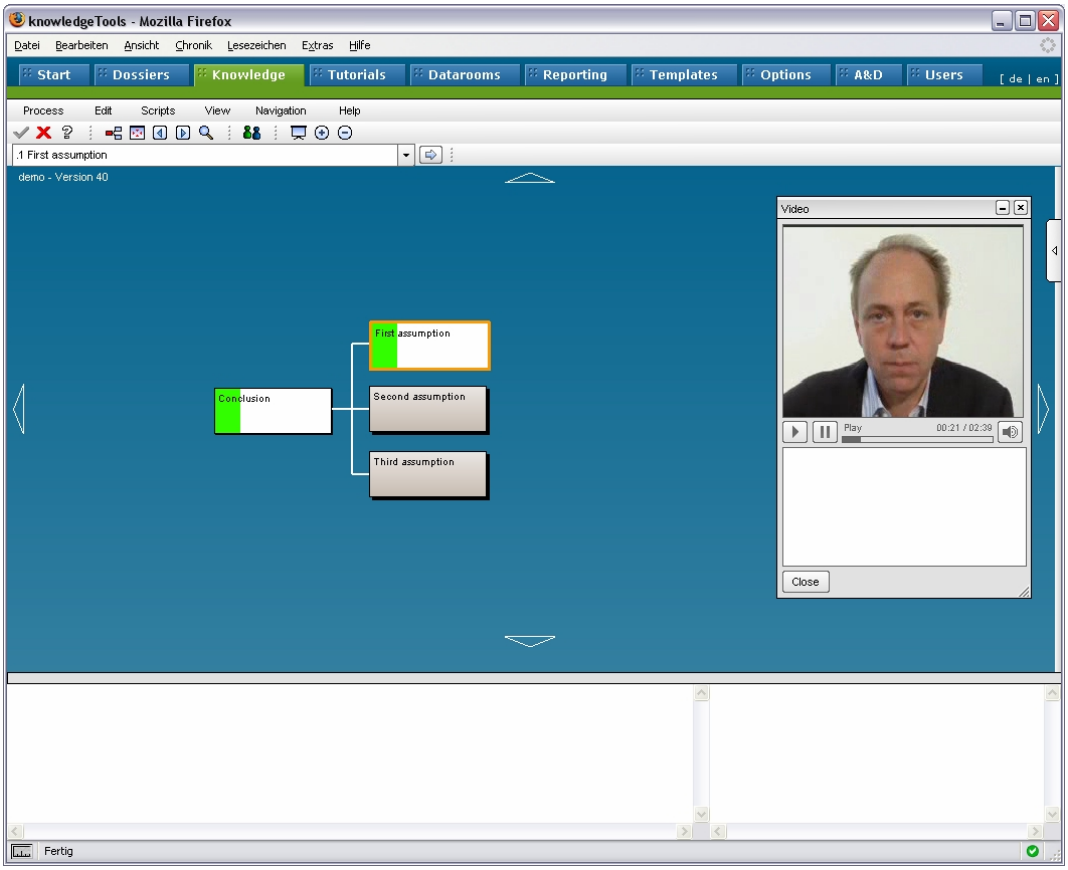


Fig.: A tutorial

14.1. Creating New Tutorials

Click on the "**Tutorials**" tab at the top of the screen. A list of all the tutorials on the server that are available to you will be displayed. Please note that only tutorials that refer to knowledgeTools that you possess at least read access for will be displayed in the list.

NOTE: In order to edit existing tutorials, or to create new tutorials, you must possess the, "Tutorial Admin", administrative access right. In any cases of doubt, please contact your user administrator.

If you are authorized to create new tutorials, then the [New Tutorial] button will be displayed at the bottom of the window. In order to create a new tutorial, click on the button and a dialog box will open. Start by entering a name for the new tutorial in the dialog box and then select the knowledgeTool that you want to integrate in the tutorial by using the selection list below it. All the knowledgeTools for which you possess at least read access will be displayed in the list.

If you are authorized to edit a tutorial, then the [Edit] button and the button will be displayed on the left, next to the name of the tutorial. Click on the [Edit] button next to the name of a tutorial to edit it. Click on the button next to the name of a tutorial to delete it.

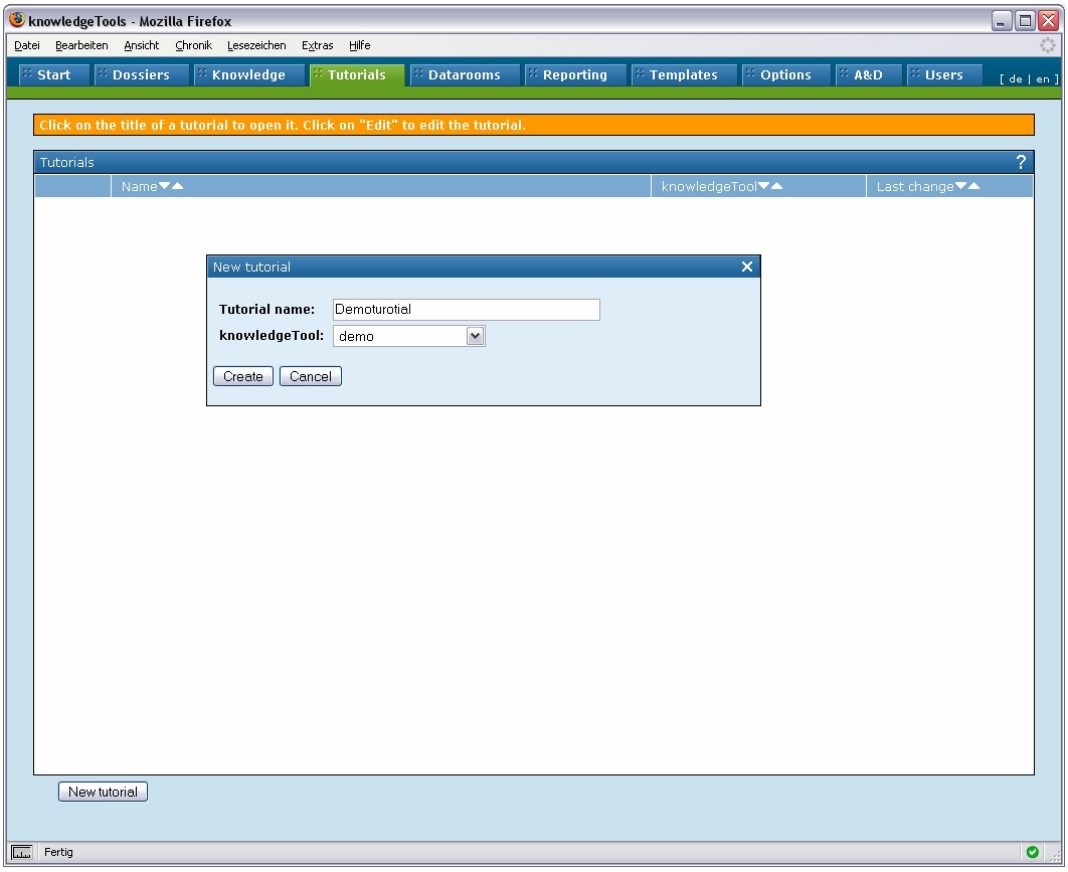


Fig.: The "New Tutorial" dialog box for the creation of new tutorials

It is advisable to use knowledgeTools that do not contain any additional texts (e.g. explanations) at the bottom of the screen.

Click on the [Create] button to move on to the next editing step.

14.2. Assigning Videos and Slides

On the next page, the name of the tutorial that you have created will be displayed. Below it, the address (URL) at which you can access the tutorial directly will also be displayed, e.g. if you want the tutorial to be accessed by a link on another website.

Use the "Upload Video" function to upload a video to the server from your computer. Please note that the video must be in FLV 1.1 format and that the file should not exceed a size of 40 MB.

1. Click on the [Browse] button to select the file from your computer.
2. Click on the [Upload] button to upload the file to the server.

Alternatively, you may also use a video that is already on the server:

1. In order to do so, click on the drop-down list in the line labelled "Select Existing Video".
2. Select a video on the server and then click on the [Select] button.

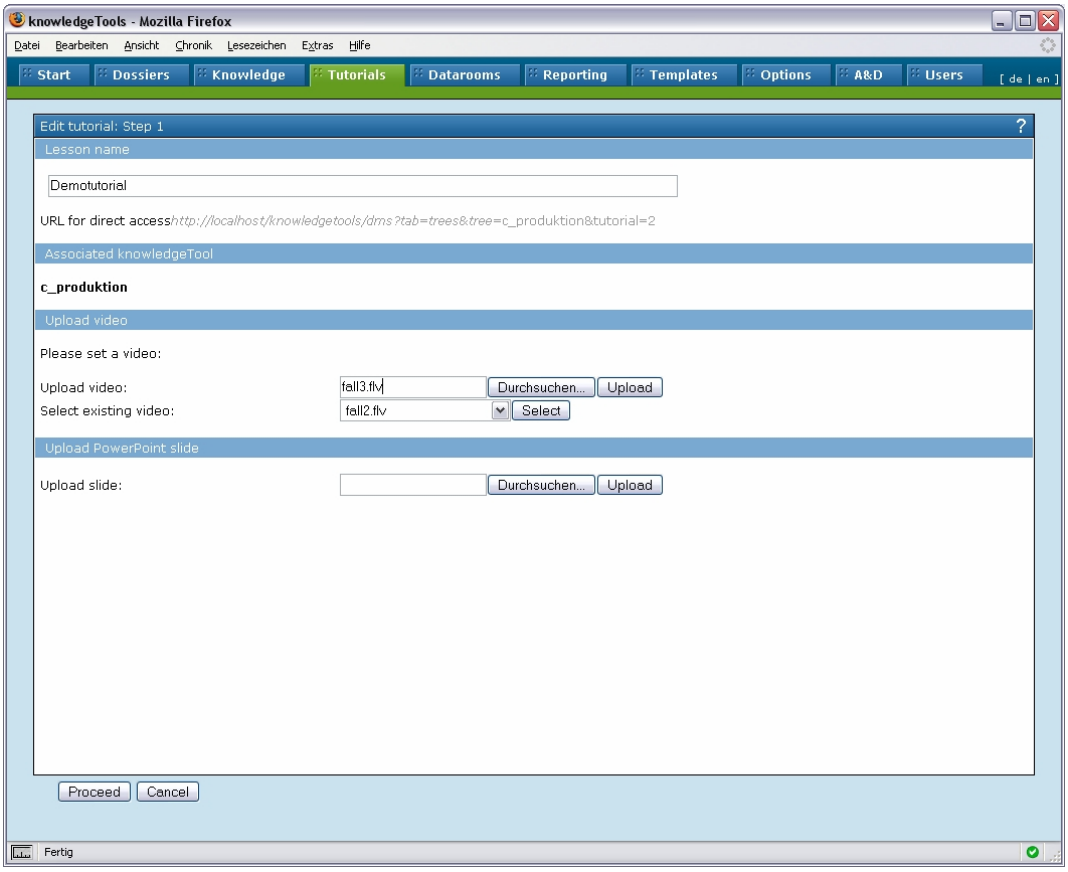


Fig.: Uploading individual files for the creation of a new tutorial

You also have the option to assign several individual PowerPoint slides, in "SWF" format, to a tutorial. These PowerPoint slides should first have been converted to "SWF" format using OpenOffice.

In order to do so, proceed as follows:

1. Open a PowerPoint presentation in OpenOffice.
2. Make sure that the presentation only contains a single slide.
3. Open the "File" menu and select the "Export" option.
4. Select a location to save the file that you want to create and enter a filename.
5. Select the option, "Macromedia Flash (SWF)" under "File Format".
6. Click on [Save].

You can now upload the created file to the server:

1. Click on the [Browse] button under "Upload PowerPoint Slide" in order to select a file from your computer.
2. Click on the [Upload] button to upload the file.
3. If you want to upload several such files, then please repeat the two previous steps.

Click on the [Continue] button to move to the next editing step.

14.3. Creating Scripts for Tutorials

You can now create the script for your tutorial. When creating the tutorial script, you can set the time in the video when you want specific events in the tutorial to be activated.

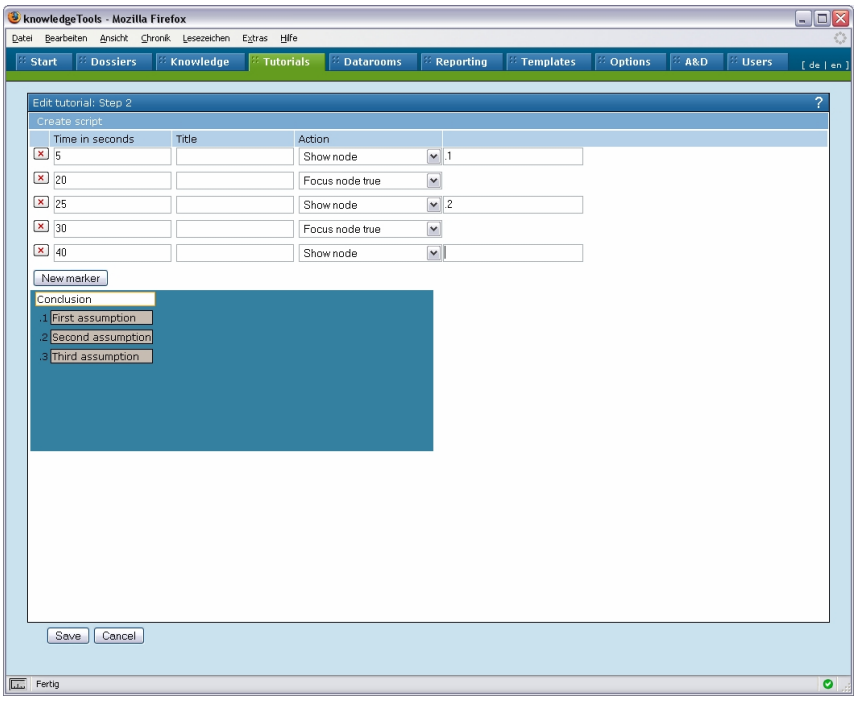


Fig.: Creating the tutorial script for a new tutorial

In order to create a script, proceed as follows:

1. Click on the [Play Video] button and the selected video file will be opened. You can always stop the video or jump to a certain position in the video using the slide control.
2. Click on the [New Marker] button. If you now click on the clock icon on the right-hand side next to the disabled field, then the current time of the video will be used. The event that you then define will be executed at this time.
3. You also have the option to enter a text in the field labelled "Title". This text will be displayed in the video window of the tutorial, under the video, and function as a marker to a specific position in the tutorial. **Tip**: it is possible to select a value of 0 seconds for the first time and to assign it a title such as "Start". By clicking on this title the subsequent viewers of the tutorial will always be able to return to the beginning of the tutorial.
4. You can determine which event will be activated at the predetermined time by using the drop-down list in the "Action" column. The following events are available:
   - Access Node
   - Focus Node Green
   - Focus Node Red
   - Focus Node Not Checked
   - Show Slide

   If you select the action, "Access Node", then a new input field will appear on the right, next to the selection list. Click on the input field and select the node that you want to access at a predetermined time from the visual display of the tree.
   The actions, "Focus Node Green", "Focus Node Red" or "Focus Node Not Checked" always refer to the current node, i.e. the last accessed node.
   If you select the action, "Show Slide", then an additional selection list will appear on the right, next to the drop-down list. This list will display the PowerPoint slides that you have previously uploaded to the server. Select the slide that you want to display from this list.
5. Click on [New Marker] to add more events to the script.
6. Finish by clicking on the "Save" button below to save your script and the tutorial. The tutorial will immediately be available to all of the users that are authorized to access the knowledgeTool referred to in the tutorial.

Click on the button to remove an event from the list.

14.4. Viewing Tutorials

All the tutorials that are available on the server, i.e. the tutorials that you possess at least read access for, are displayed in the "**Tutorials**" tab. Whether or not you are authorized to view a tutorial (and consequently the list of tutorials), depends on whether you possess read access to the knowledgeTools that are referred to in the tutorial or not.
The list of available tutorials displays the name of the tutorial, as well as the technical name of the knowledgeTool that is referred to and the date that the tutorial was last changed. Click on the name of a tutorial to start the tutorial.

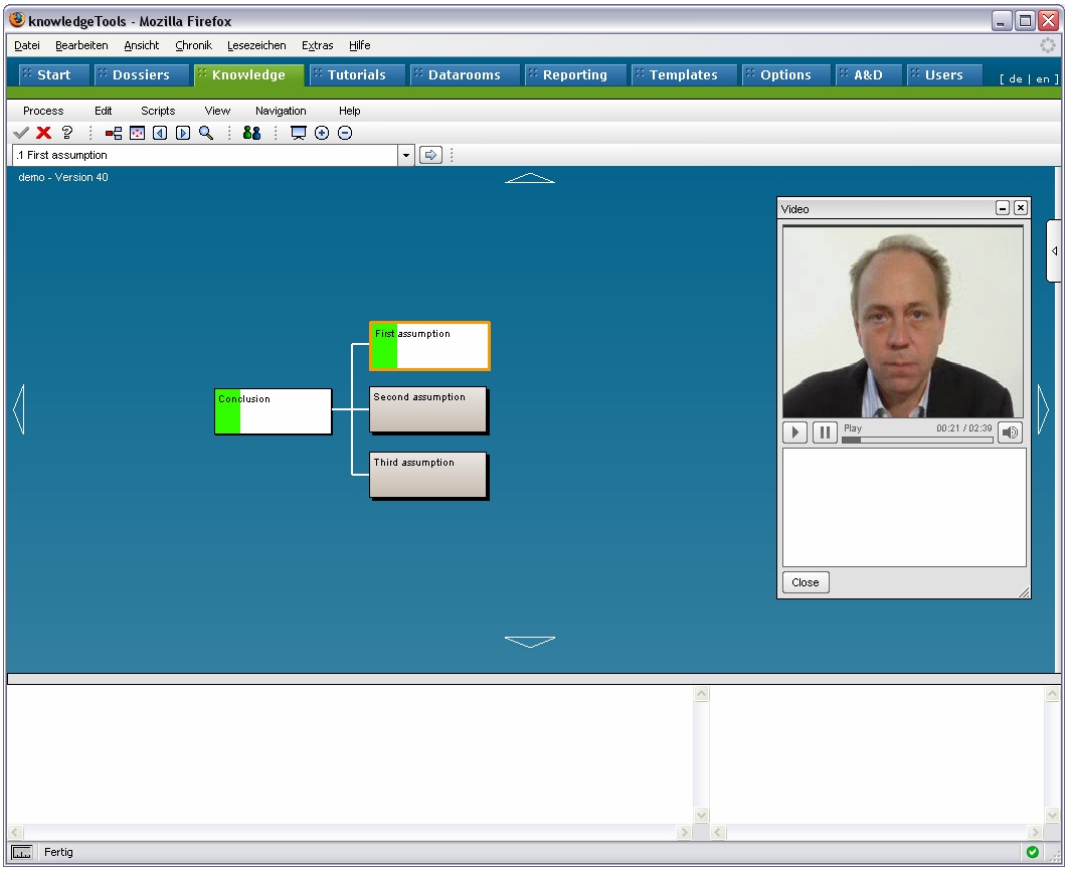


Fig.: A tutorial

The tutorial is displayed using the normal user interface of the knowledgeTools client. A video player appears on the right-hand side of the screen and displays the video that is associated with the tutorial. The video player window can be moved with the help of the mouse and minimized by clicking on the minimize button [_] at the top right-hand corner of the window.
The elapsed time is displayed next to the total time of the video (and tutorial) below the actual video.
You have the option to pause the tutorial by clicking on the ⏸ button and to continue playing the tutorial by clicking on the ▶ button.

If you click on the button, then the volume of the video will be muted. If you click on the button again, then the default volume of the video will be restored.
If the author of the tutorial has set markers, then these will be displayed below the video. You have the option to move directly to a position in the tutorial that has been specified by the author, by clicking on the title of the marker.

During the playback of the video, the majority of the functions in the client are disabled, i.e. you cannot open menus, assign colour markings to nodes, etc. If you pause the video by clicking on the button, then the functions will be reactivated. Please note that any entries, e.g. colour markings, that are made when the video is paused, will be deleted as soon as the playback of the video resumes.
You can end the tutorial at any time by clicking on the [**x**] button at the top right-hand corner of the video player window. If you end the tutorial, then the functions of the client are reactivated.

15. User Administration

You can create, edit and delete users and user groups, as well as edit the administrative and content-related rights of existing users and user groups in the user administration.

NOTE: In order to create users or edit existing users, you must possess the "User Admin" user administration right. If this is the case, then the "**Users**" tab will be displayed at the top of your screen. Click on this tab to open the user administration.

15.1. Creating New Users

1. Click on the [New User] button at the bottom of the screen.
2. Enter the user name of the new user on the next page. The user will use this name to login to the system in the future. Please note that the user name must be an existing e-mail address.
3. Enter the name(s) and surname of the user, as well as a password of your choice, in the corresponding fields. Due to security reasons, the password must be made up of at least 6 characters. Re-enter the password in the next line.
4. You can now determine the access rights of the new user by selecting one of the three options, "Supervisor", "Manager", or "Viewer", under "*Global Access Rights*". Please refer to the corresponding summary in the appendix for further details concerning these authorization levels.
5. If you want the new user to be granted administrative access rights, then click on the arrow next to "*Administrative Access Rights*" and select the applicable access rights. Please refer to the corresponding summary in the appendix for further details concerning these authorization levels.
6. In order to add the new user to an existing user group, click on the arrow next to "*Group Affiliation*", if available, all of the existing user groups on the server will now be listed. Select the required user group(s) by using the corresponding check boxes.
7. Click on the arrow next to "*Access rights for knowledge areas*" to grant the new user access to existing knowledge fields. The left column of the table that opens, displays a list of the existing knowledge fields (trees) on the server. The access rights to each tree are granted separately. There are three columns with check boxes next to the name of each tree. By using these check boxes, you can determine whether you want the user to be able to:
   - only open a tree to read it,
   - edit a tree or
   - analyse the processes that have been created on the basis of the tree.

Finish by clicking on the [Save] button below; the new user will be created with all the data and authorizations that you have entered.

NOTE: The different authorization levels and their implications are described further on in the User's Manual.

15.2. Searching for Existing Users

Enter the user name (the e-mail address), name or surname of the user that you want to search for in the field labelled "*Search For*" under "*Search For User*". (Alternatively, you can click on the button labelled [Show All Users] to display a complete list of all the existing users.)

NOTE: If you do not enter anything in the field labelled "Search For", then your search results will display all the existing users. This may prolong the search process if there is a large number of users.

In the default version, the user name is searched for in the user database. By using the correspondingly labelled selection buttons, it is also possible to narrow the search to names and surnames. Click on the [Search] button to start the search. The search results will display all the users that match the search criteria that you have entered. You can access more information on the user by clicking on the user's name.

15.3. Deleting Existing Users

NOTE: Please note that if you delete a user, then all the processes that have been created by this user will also be deleted. The only exceptions are those processes that
- have been created on servers on which the Dossier Module is installed and
- have been activated for other users.

1. Enter the user name (the e-mail address), name or surname of the user that you want to search for in the field labelled "*Search For*" under "*Search For User*".
2. Click on the [Search] button.
3. Select the user that you want to delete by clicking on the user name.
4. Click on the [Delete User] button.

15.4. Creating New User Groups

Creating new user groups is generally the same as creating new users.

1. Click on the button labelled [New User Group] at the bottom of the screen.
2. Enter a name for the user group that you want to create.

3. Select whether you want to grant the future members of the user group, "Supervisor", "Manager", or "Viewer" rights under "*Global Access Rights*".
4. Select the administrative rights that you want to grant to the future members of the user group under "*Administrative Access Rights*".
5. Select the trees that you want the future members of the user group to be able to access under "*Access rights for knowledge areas*".
6. Finish by clicking on [Save] to save your entries and create the new user group.

15.5. Searching for Existing User Groups

1. Click on the "**Users**" tab to open the user administration start page.
2. Enter the name of the user group that you want to search for in the field labelled "*Search For User Group*" and click on [Search]. (Alternatively, you can click on the button labelled [Show All User Groups] to display a complete list of all the existing user groups.)
3. If one or more user groups are found that match the search term that you have entered, then the names of the user groups will be displayed in the list of search results. You can access more information about the selected user group by clicking on the name of the user group.

15.6. Deleting Existing User Groups

Deleting user groups is generally the same as deleting users. Search for the user group that you want to delete as described above and click on the name of the user group.
Click on the button labelled [Delete User Group] at the bottom of the screen and acknowledge the security prompt by clicking on [OK].

16. Access Rights System

LOGOS has an authorization system with a tiered system of access rights.
Access rights can be assigned to users, as well as user groups. The access rights that are granted to a member of a user group are the same as the rights that are granted to the entire user group. Access rights are granted in the user administration section, as described earlier on.
The access rights structure and the available authorization levels are described in the following chapter.

NOTE: A tabular summary of the access rights structure of the LOGOS server is available further on in chapter 16.5.

16.1. Global Access Rights

The global access rights primarily determine the functions that are *generally* available to a user or user group. However, in order to use certain functions, it is also necessary to define the access rights for individual knowledge trees (see chapter 16.3).

16.1.1. Supervisor

This authorization level consists of the most extensive global access rights. Users and/or user groups that possess this authorization level are generally able to:

- *open trees for reading* (if they also possess read access to the trees; see chapter 16.3.1)
- *create processes in trees*
- *edit the structure of trees* (if they also possess the right to edit the trees; see chapter 16.3.2)
- *edit the additional information of trees* (if they also possess the right to edit the trees; see chapter 16.3.2)
- *access statistics on trees* (if they also possess the corresponding tree-related access rights)

16.1.2. Manager

This authorization level is suitable for users and/or user groups that want to use knowledge trees in a process-oriented way. This authorization level allows users and/or user groups to:

- *open trees for reading* (if they also possess read access to the trees; see chapter 16.3.1)
- *create processes in trees*

- *edit the additional information of trees – but not the tree structure itself* (if they also possess the right to edit the trees; see chapter 16.3.2)

16.1.3. Viewer

This authorization level has the least access rights. Users and/or user groups with this authorization level are only able to:

- *open trees for reading* (if they also possess read access to the trees; see chapter 16.3.1)
- *create processes within trees*

16.2. Administrative Access Rights

Administrative access rights apply for the entire server and are not restricted to individual knowledge trees.

16.2.1. User Management Admin

Users and/or user groups that possess this access right are able to:

- create new users and assign them access rights
- edit existing users and their access rights
- delete existing users
- create new user groups and assign them access rights
- edit existing user groups and their access rights
- delete existing user groups.

The "**Users**" tab, and consequently access to the user administration section, will only be displayed to users that possess this access right.

16.2.2. Tutorial Admin

This access right is only available if the Tutorial Module is installed on your LOGOS server. Users that possess this access right are able to:

- create new tutorials
- edit existing tutorials

The "**Tutorials**" tab is generally visible to all users. The [New Tutorial] button will also be displayed to Tutorial Admins at the bottom of their screen. In addition, buttons for deleting and editing tutorials will also be displayed next to the individual tutorials.

16.2.3. Tree Admin

Only users and/or user groups that possess this access right can:

- create new knowledge trees and
- publish knowledge trees (in so far as the users also have read access to the trees)

- re-index knowledge trees (in so far as the users also have read access to the trees)
- export knowledge trees (in so far as the users also have read access to the trees)
- delete knowledge trees (in so far as the users also have read access to the trees)
- execute field upgrades in knowledge trees (in so far as the users also have read access to the trees).

In addition, only users and/or user groups that possess this access right can use the following functions in the "**Options**" tab:

- export and delete laws and decisions
- import product files (knowledge trees, datarooms, scripts, laws and decisions)
- import and export "KTD" files
- export and delete scripts
- import MS Word documents.

16.2.4. Laws and Decisions Admin

Users with this authorization level will be able to perform the following actions in the integrated Legal Database:

- create new laws
- edit existing laws
- delete existing laws
- create new decisions
- edit existing decisions
- delete existing decisions

16.2.5. Forum Admin

Users that possess this access right can delete existing forum contributions in the discussion forums of all trees.

16.3. Tree-Related Access Rights

These access rights apply for the entire tree, but not for the entire server; i.e. the access rights to trees must be determined individually for each user and/or user group. The access rights to trees are classified in three levels.

16.3.1. Read Access

The tree in question can only be opened for reading. It is possible to create processes in the tree (in so far as the corresponding global access rights are available; see above). In addition, users with this authorization level are unable to change the tree structure and

the additional texts, or to create links between the contents of files and the script sidebar.

16.3.2. Edit Access

The tree in question can be opened for reading (i.e. in normal mode) and can also be opened for editing (i.e. in editor mode).
The editing rights can also be additionally tiered by combining the global access rights: "Supervisor" and "Manager", with the "Edit" access right for the individual tree:

Users that possess the "Supervisor" global access right, as well as the right to edit a tree, are able to perform the following actions in the tree:

- edit the tree structure
- edit the technical tree properties
- create, edit and delete the additional information texts
- upload files to the tree and link them to the additional information texts
- assign datarooms to the tree
- assign sidebar documents to the tree
- create and remove links between the nodes of the tree and files from linked datarooms
- create and remove links between the nodes of the tree and text sections from linked documents

Users that possess the "Manager" global access right, as well as the right to edit a tree, are able to perform the following actions in the tree:

- create, edit and delete the additional information texts
- upload files to the tree and link them to the additional information texts
- create and remove links between the nodes of the tree and files from linked datarooms

16.3.3. Process Analysis Access

There are three different types of analyses that are available for the trees:

- the analysis of created processes
- the graphical process analysis
- the raw data analysis

These analyses are described further on in the User's Manual.

16.4. Special Access Rights When Using Add-On Modules

If you are using the following add-on modules on your LOGOS server

- Dataroom Module
- Dossier Module
- Tutorial Module

then there are also certain restrictions with regard to their use depending on the access rights of the individual users.

16.4.1. Special Access Rights When Using the Dataroom Module

Tree Admin

If the Dataroom Module is installed, then only users that possess this access right have access to all the functions of the dataroom. All datarooms are displayed, regardless of the access rights of the users to the individual knowledge trees linked to the datarooms.

Only Tree Admins can

- export datarooms as product files
- download directories
- create new datarooms
- delete existing datarooms.

Viewer

The "**Datarooms**" tab is not visible to users that possess this access right. If individual datarooms are linked to trees and the user has read access to these trees as a "Viewer", then the user also has read access to the datarooms that are linked to the corresponding tree in the tree view.

16.4.2. Special Access Rights When Using the Dossier Module

Supervisor

If the Dossier Module is installed, then users and/or user groups that possess this access right can:

- *create, edit and delete dossiers*
- *create, edit and delete dossier contents (processes, files and notes)*
- *create, edit and delete process and layout templates.*

Manager

If the Dossier Module is installed, then users and/or user groups that possess this access right can:

- *create, edit and delete dossiers*
- *create, edit and delete dossier contents (processes, files and notes).*

Viewer

If the Dossier Module is installed, then it is not possible access dossiers or create processes with this access right.

16.4.3. Special Access Rights When Using the Tutorial Module

Supervisor

If the Tutorial Module is installed, then users and/or user groups that possess this access right can view tutorials if they also possess read access to the trees that are linked to the tutorial.

Manager

If the Tutorial Module is installed, then users and/or user groups that possess this access right can view tutorials if they also possess read access to the trees that are linked to the tutorial.

Viewer

If the Tutorial Module is installed, then users and/or user groups that possess this access right can view tutorials if they also possess read access to the trees that are linked to the tutorial.

16.5. Tabular Summary

The following tables describe the access rights that the users must possess in order to access specific functions. Certain functions are only available if the corresponding licence is installed on your server. The required licences are listed separately.

Trees	
Function	Minimum Requirement
Create New Trees	Tree Admin
Publish Trees	Tree Admin + Tree Right (Write)
Import Trees	Tree Admin
Delete Trees	Tree Admin + Tree Right (Write)
Open Trees	Tree Right (Read)
Edit Structure	Supervisor + Tree Right (Write)
Edit Additional Information	Manager + Tree Right (Write)
Change Technical Tree Properties	Supervisor + Tree Right (Write)
Re-index Trees	Tree Admin + Tree Right (Write)
Export Trees as “KIP” Files	Tree Admin
Export Trees as “KTD” Files	Tree Admin
Execute Field Upgrades	Tree Admin + Tree Right (Write)

Dossiers	
Function	Minimum Requirement
Basic Availability	**Dossiers Licence**
Create Dossiers	Manager
Delete Dossiers	Manager + Activation for Dossier Contents
Edit Master Data	Manager
Activate Dossiers	Manager
Read Activated Dossier Contents	Manager + Activation for Dossier Contents
Edit Activated Dossier Contents	Manager + Activation for Dossier Contents
Delete Activated Contents	Manager + Activation for Dossier Contents
Configure Master Data	Supervisor

Datarooms	
Function	Minimum Requirement
Basic Availability	**Dataroom Licence**
Create Datarooms	Supervisor + Tree Admin
Import Datarooms	Tree Admin
Delete Datarooms	Manager + Tree Admin + Write Access to Dataroom
Export Datarooms as “KIP” Files	Manager + Tree Admin + Read Access to Dataroom
Download Datarooms as “ZIP” Files	Manager + Tree Admin + Read Access to Dataroom
View Datarooms	Manager + Read Access to Dataroom
Open Files	Manager + Read Access to Dataroom
Rename Files	Manager + Write Access to Dataroom
Index Files	Manager + Write Access to Dataroom
Copy Files	Manager + Write Access to Dataroom
Delete Files	Manager + Write Access to Dataroom
Upload Files	Manager + Write Access to Dataroom
Create Directories	Manager + Write Access to Dataroom
Rename Directories	Manager + Write Access to Dataroom
Delete Directories	Manager + Write Access to Dataroom
Download Directories	Manager + Read Access to Dataroom
Re-index Directories	Manager + Write Access to Dataroom
Configure Indexing	Supervisor + Write Access to Dataroom

Templates	
Function	Minimum Requirement
Basic Availability	**Dossiers Licence**
Create Templates	Supervisor + Tree Right (Read)
Edit Templates	Supervisor + Tree Right (Read)
Delete Templates	Supervisor + Tree Right (Read)

Calculator	
Function	Minimum Requirement
Basic Availability	**Calculator Licence**
Configure Calculator	Supervisor + Tree Right (Write)
Save and Export Calculations	Manager + Tree Right (Read)

Risk Analysis	
Function	Minimum Requirement
Basic Availability	**Risk Analysis Licence**
Configure Calculator	Supervisor + Tree Right (Write)
Save and Export Calculations	Manager + Tree Right (Read)

Legal Database	
Function	Minimum Requirement
Basic Availability	**Legal Database Licence**
Export Laws / Decisions	Tree Admin
Import Laws / Decisions	Tree Admin
Delete Laws / Decisions	Tree Admin
Edit Laws / Decisions	A&D – Editor

Scripts	
Function	Minimum Requirement
Basic Availability	**Dataroom Licence**
Create Scripts	Supervisor + Tree Right (Write)
Import Scripts	Tree Admin
Edit Scripts	Supervisor + Tree Right (Write) + Script Right (Write)
Read Scripts	Viewer + Tree Right (Read) + Script Right (Read)
Delete Scripts	Tree Admin
Export Scripts	Tree Admin
Import MS Word Documents as Scripts	Tree Admin

Tutorials	
Function	Minimum Requirement
Basic Availability	**Tutorial Licence**
Open Tutorials	Viewer + Tree Right (Read)
Create Tutorials	Tutorial Admin + Tree Right (Read)
Edit Tutorials	Tutorial Admin + Tree Right (Read)
Delete Tutorials	Tutorial Admin + Tree Right (Read)

Process Analyses	
Function	Minimum Requirement
Basic Availability	**Standard**
View Process Analyses	Supervisor + Tree Right (Process Analysis)

Statistics	
Function	Minimum Requirement
Basic Availability	**Standard**
Access Analysis on Created Processes	Supervisor + Tree Right (Read) + Tree Right (Process Analysis)
Access Raw Data of All Processes	Supervisor + Tree Right (Read) + Tree Right (Process Analysis)
Access Graphical Process Analysis	Supervisor + Tree Right (Read) + Tree Right (Process Analysis)
Access User Statistics	User Admin + Supervisor + Tree Right (Read)

17. Using Statistics

Users can access different analyses of the use of the knowledgeTools on the server in the "**Reporting**" tab.

There are four types of analyses available:

- the analysis of created processes
- the graphical process analysis
- the raw data analysis
- the user statistics

In order to access one of these analyses, proceed as follows:

1. Click on the "**Statistics**" tab.
2. Select the required type of analysis by clicking on it with the mouse.
3. On the next page, select the tree that you want to display the analysis for and the analysis will be displayed.

NOTE: In order to view analyses, you must possess the "Supervisor" global access right, as well as the "Process Analysis" right for the respective tree. In order to be able to access the user statistics, you must possess the "User Admin" administrative access right.

17.1. The Analysis of Created Processes

The process analysis provides an accumulated display of all processes and indicates which nodes of a tree have been marked as "True" or "False". In addition, it shows whether these markings have been manually set by users or set by the system on the basis of the tree logic.

NOTE: Only processes that have been created in the currently published version of the tree are displayed. Processes that have been created in older versions of the tree are not displayed.

The analysis is displayed in a table:

- the "Node Title" column lists the title of the node where a colour marking has been assigned in a process
- the "Path" column displays the path of the node in order to clearly identify it
- the "True (manual)" column shows how often the "green" colour marking (i.e. "True") has been manually assigned by users at the node

- the "False (manual)" column shows how often the "red" colour marking (i.e. "False") has been manually assigned by users at the node
- the "True (logic)" column shows how often the "green" colour marking (i.e. "True") has been automatically assigned by the system on the basis of the logical colour marking system
- the "False (logic)" column shows how often the "red" colour marking (i.e. "False") has been automatically assigned by the system on the basis of the logical colour marking system.

The analysis can also be downloaded as an "XLS" file (e.g. for further processing in Excel). In order to do so, click on the [Download Excel] button.

17.2. The Graphical Process Analysis

This variation of the process analysis provides an accumulated graphical display of the working results of all the processes of a tree.

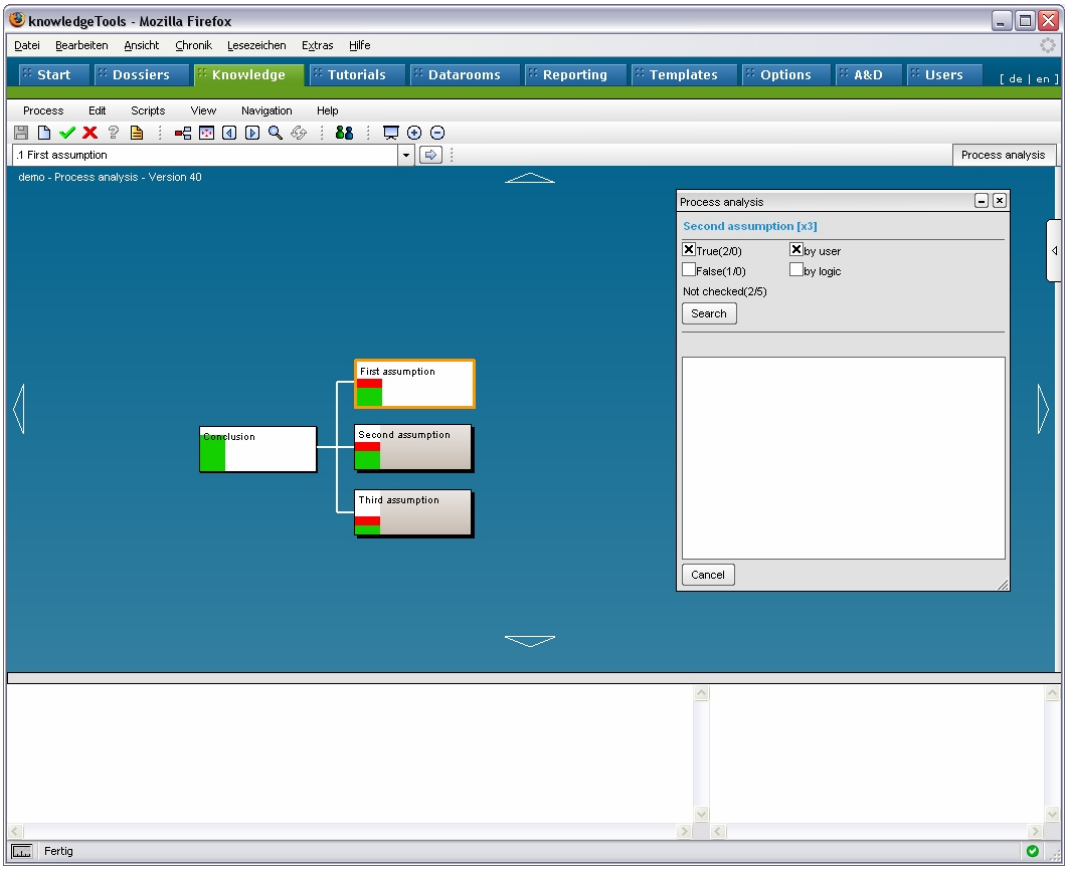


Fig.: Graphical process analysis

In this analysis, a stacked bar chart is displayed next to each node of a tree. The bar chart shows how often the node has been marked as "True" (green) or "False" (red) in relation to all the processes that have been created in the tree. Therefore a bar chart

with identical red and green bars would mean that the corresponding node has been marked as "True" in 50% of all the processes and marked as "False" in the other 50% of all the processes.
White sections in the bar chart represent processes where the nodes have not yet been marked or have been explicitly set as "Not Checked".
The graphical process analysis is suitable for analysing processing trends.

If you move over the bar with the mouse pointer, then detailed information on the individual nodes will be displayed in a yellow box. The following information will be displayed:

- how often the node has been marked as "True" or "False" by users
- how often the node has been automatically marked as "True" or "False" by the system on the basis of the logical colour marking system
- how often the node has been marked as "True" or "False" altogether (in the line labelled "Total Markings")
- how many processes have been analysed altogether
- the difference between the total number of processes of the node and markings on the node

If you click on the bar, then the "Process Analysis" window will open; you can search for specific processes in this window. In this case, the search is only performed in the respective node.
By using the search options, you can search for processes in which the node has been automatically or manually set as "True" or "False".
The search results display the name of the corresponding process, the user name of the user that created the process, as well as the date that it was created on. If you click on the name of a process in the search results, the process will open.

17.3. Graphical Process Analysis and Risk Analysis

knowledgeTools that have been assigned the application type, "Risk Analysis", have a special form of the graphical process analysis at their disposal.
This analysis can be accessed by clicking on the "Reporting" tab in the normal way and then clicking on "Graphical Process Analysis".
Contrary to with the standard graphical process analysis, the *average* probability of occurrence, which is derived from all the entered and calculated probabilities of occurrence in all the processes at *this* node, is displayed in a visualized form on the left in the node.

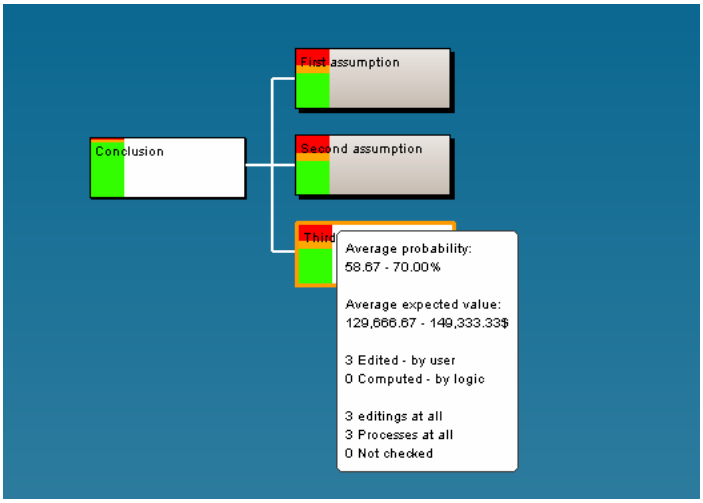


Fig.: The display of probability of occurrence (Ø) and expected value (Ø)

If you move over the node with the mouse pointer, then the average probability of occurrence will be displayed in a tooltip. In addition, you will also see how many processes and edits the calculation is based on. If an expected value has been calculated in the individual processes at the corresponding node, then the average expected value that has been calculated from these values will also be displayed.

If you click on the coloured bar with the mouse, you can open the "Process Analysis" window. In this window, you can view all the specific processes, in which the probability of occurrence of the corresponding node has been derived from manual entries by users or automatic calculations.

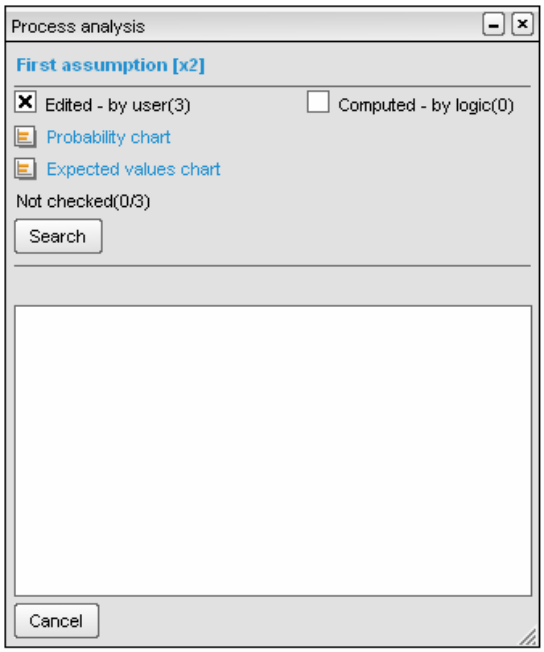


Fig.: The "Process Analysis" window

In addition, you also have the option to access two diagrams that visualize the distribution of the individual values in this window.

NOTE: Please note that the values of all the processes are used as the basis for the calculation of the average probability of occurrence, or respectively, the average expected value. This also includes those processes that have not been checked in the current node, i.e. where no probability has been entered. In this case, the node has a probability of occurrence between 0% and 100%.
Consequently, the value "between 0% and 100%" will be used for the calculation of the average value and can therefore lead to considerable differences in the overall result. If you do *not* want the probability values from the unchecked nodes to be included in the calculation, then please select the "Ignore Not Checked" option from the "Process" menu. This setting will then be applied for the calculation of the average at all the nodes in the tree.

17.3.1. Displaying the Average Probability of Occurrence

Click on the "Probability of Occurrence Diagram" icon in the "Process Analysis" window in order to open the diagram. The diagram displays both the average probability of occurrence, as well as the exact values that have been entered and/or calculated in the *individual processes* and constitutes the basis for the calculation of the average.

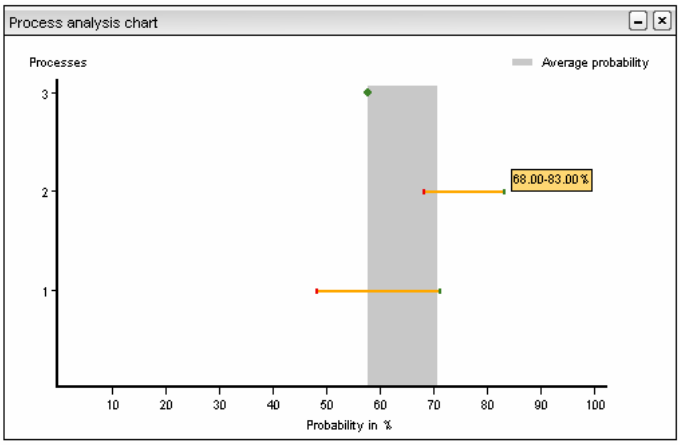


Fig.: The diagram illustrating the probability of occurrence

The vertical "Processes" axis displays the number of existing processes numbered from 1 upwards (therefore, there are three processes in the example above).
In addition to the number of each process, the horizontal axis displays the probability of occurrence that has been entered, or respectively, calculated for the corresponding process in the node. In the case of an *exact* probability value (e.g. 85%), the value is

displayed as a single dot. The value can be derived from the horizontal "Probability of Occurrence in %" axis. If, instead of an exact value, a range of possible values has been entered (e.g. 80% to 85%), then these values will be displayed as two dots that are connected by a line. The red dot represents the minimum probability value and the green dot represents the maximum probability value. If you move the mouse pointer over the dots, then the precise values will be displayed in a yellow tooltip.

A vertical grey bar displays the average probability of occurrence that has been calculated from the values of the individual processes.

17.3.2. Displaying the Average Expected Value

Click on the "Expected Values Diagram" icon in the "Process Analysis" window in order to open the diagram. The diagram displays both the average expected value, as well as exact values that have been entered and/or calculated in the *individual processes* and constitute the basis for the calculation of the average.

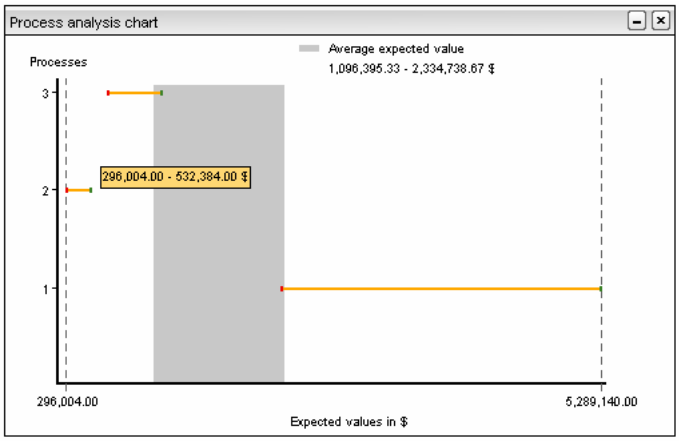


Fig.: The diagram illustrating the expected values

The vertical "Processes" axis displays the number of existing processes numbered from 1 upwards (therefore, there are three processes in the example above). In addition to the number of each process, the horizontal axis displays the expected value that has been calculated in the corresponding process of the node. In the case of an *exact* expected value (e.g. EUR 10,000), the value is displayed as a single dot.

The value can be derived from the horizontal "Expected Value in (Currency)" axis. If, instead of an exact value, a range of possible values has been calculated (e.g. EUR 5,000 to EUR 10,000), then these values will be displayed as two dots that are connected by a line. The red dot represents the minimum expected value and the green dot represents the maximum expected value. If you move the mouse pointer over the dots, then the precise values will be displayed in a yellow tooltip.

The two dotted lines at the opposite ends of the horizontal axis represent the minimum and maximum expected values. Both values are also displayed as a figure under the corresponding lines.
A vertical grey bar displays the average expected value that has been calculated from the expected values of the individual processes.

17.4. The Raw Data Analysis

The raw data analysis is another variation of the process analysis. This analysis displays not only the tree nodes that have been marked as "True" or "False" within the individual processes, but also the data that has been entered into the input fields of the trees.

NOTE: Only the data of processes that have been created in the currently published version of the tree is displayed. The data of processes that have been created in older versions of the tree is not displayed.

The analysis is displayed in a table:

- the "Process" column displays the name of the process into which the data was entered
- the "User" column displays the name of the user that created the process
- the "Node Title" column displays the title of the node, where a colour marking has been assigned or an input field has been completed
- the "Node ID" column displays the unique ID of the node, where a colour marking has been assigned or an input field has been completed
- the "Path" column displays the unique path of the node, where a colour marking has been assigned or an input field has been completed
- the "Marking" column displays whether the node has been marked within the process as "True" or "False" (this analysis does not differentiate between nodes that have been set manually or automatically). If probabilities of occurrence have been entered in the processes, then the corresponding values are displayed in per cent.
- The "Value (*Currency*)" column displays the value that has been entered at the node, and where applicable, the selected currency, for processes that have been created in risk analysis trees
- The "Emin" column displays the minimum expected value for processes that have been created in risk analysis trees
- The "Emax" column displays the maximum expected value for processes that have been created in risk analysis trees

- the "Field Name" column displays the name of the input field (if it exists) at the node; if there are several input fields at a node, then these will each be displayed in a new line
- the "Value" column displays the content that has been entered into the previous field

The analysis can also be downloaded as an "XLS" file (e.g. for further processing in Excel). In order to do so, click on the [Download Excel] button.

17.5. The User Statistics

This analysis shows you which users have accessed trees and for what periods of time.

NOTE: This analysis is only available on servers that have been pre-configured accordingly.

The analysis is displayed in a table:

- the "User" column contains the user name
- the "Start Date" column displays when the user logged into the system
- the "End Date" column displays when the user logged out of the system
- the "Duration in Seconds" column displays how long the user was online between logging in and logging out
- the last two columns display how many nodes the user clicked on during the period that they were online.

18. General Administration of the Server

The basic administration tasks include the starting, stopping and restarting of the server, the installation of patches, the creation and restoration of backups and the configuration of the server. These tasks can be accomplished by using the LOGOS server console and/or the LOGOS web console. The LOGOS server console is only available in LOGOS installations that are running on MS Windows.

18.1. The LOGOS Server Console

The following functions are available in the server console:

- Starting / Stopping the Server
- Editing the LOGOS Server Configuration
- Adding Administrators
- Changing User Passwords
- Installing Patches
- Creating Backups
- Restoring Backups

NOTE: Please note that the LOGOS server console is only available if LOGOS has been installed on a computer that is running an MS Windows operating system. The LOGOS server console can only be executed if the user account has administration rights.

18.1.1. Starting / Stopping the Server

NOTE: You should only stop or restart the server if you are sure that there are no other users working on the system. Otherwise stopping or restarting the server may result in the loss of data.

1. Start the LOGOS server console if it is not already open. Open the Windows Start menu and go to the "LOGOS" program group. Select "LOGOS Server Console" in the "LOGOS" program group.
2. The status bar of the server console will display whether the server is running or not.
3. Open the "File" menu in the LOGOS server console and select the "Start / Stop Server" option. If the server was already running, then the server will now be stopped. If the server was not running, then the server will now start.

18.1.2. Editing the LOGOS Server Configuration

The server console allows you to edit a number of configuration settings on the LOGOS server. In order to do so, start by opening the configuration window:

1. Start the LOGOS server console if it is not already open. Open the Windows Start menu and go to the "LOGOS" program group. Select "LOGOS Server Console" in the "LOGOS" program group.
2. Open the "Options" menu and select the option labelled "Server Options".

You have the option to set or edit the following settings in the configuration window:
Web Server Port: This allows you to determine the port that you want the LOGOS server to use. In the default setting Port 80 is used.

Web Server Prefix: The prefix determines how the URL, at which the LOGOS server can be accessed, is formed. In the default setting "knowledgetools" is used as the prefix. Therefore the LOGOS server will then be able to be accessed using the following URL: *"http://your_server_name/**knowledgetools**/dms"*

Mail Server: If you have your own mail server, then you can enter it here. In order to send information by e-mail (e.g. forum contributions or comments) from within the LOGOS server, you must enter a mail server here.

X.509 (SSL) PEM File: If you want your LOGOS server to be accessible via a secure SSL connection, then you can upload the corresponding PEM file here.

Locale: You can determine the default language setting for the user interface of your LOGOS server here. You have the option to choose between German and English. Please note that each user then later has the option to switch to the language of their preference.

Company Name: You can enter your name, e.g. the name of your company, here. The text that you enter in this field will then be displayed on the title bar of your browser when you access the LOGOS server.

Forum Recipient E-Mail: You have the option to determine a user that will be sent all the LOGOS forum contributions in the server by e-mail. This is only possible if you have entered a valid mail server in the field labelled "Mail Server" (see above). In order to check whether e-mails can be sent to the entered e-mail address, click on the [Test] button. A test e-mail will then be sent to the entered e-mail address.

Administration Recipient E-Mail (Backup): In this field you have the option to enter the e-mail address of a user that will be sent a message if the automatic backup fails (see further on).

Dataroom Disk Quota Per User: In this field you can determine how much data (in megabytes) you want an individual user to be able to upload to the datarooms of your server.

Once you have finished editing the settings in the configuration window, click on the [Save] button to save your changes. You must then restart the server and the server console for the changes to take effect.
In order to do so, please proceed as follows:

1. Open the "File" menu in the LOGOS server console and select the "Start / Stop Server" option. The LOGOS server will now stop.
2. Exit the LOGOS server console.
3. Open the LOGOS server console again.
4. Open the "File" menu in the LOGOS server console and select the "Start / Stop Server" option. The LOGOS server will now start.

18.1.3. Adding Administrators

The server console allows you to add users with the following administrative access rights:

- User Management Admin
- Tree Admin
- Laws and Decisions Admin.

In order to do so, proceed as follows:

1. Start the LOGOS server console if it is not already open. Open the Windows Start menu and go to the "LOGOS" program group. Select "LOGOS Server Console" in the "LOGOS" program group.
2. Open the "Options" menu and select the "Add Administrator" option. Enter the e-mail address of the user that you would like to add as an administrator in the window that opens. Enter a password of your choice for the user in the field below. Please note that the password must contain at least 6 characters.
3. Re-enter the password in the field below.
4. Finish by clicking on the [Save] button.

18.1.4. Changing User Passwords

The server console allows you to change the passwords of existing users. In order to do so, proceed as follows:

1. Start the LOGOS server console if it is not already open. Open the Windows Start menu and go to the "LOGOS" program group. Select "LOGOS Server Console" in the "LOGOS" program group.
2. Open the "Options" menu and select the "Reset User Password" option.
3. In the window that now opens, use the "User" selection list to select the user whose password you want to change. Please note that only the user names (= e-mail addresses) of the users are displayed in the selection list.
4. Enter a password of your choice for the user in the field labelled "Password". The password must contain at least 6 characters.
5. Re-enter the password in the field below.
6. Finish by clicking on the [Save] button.

18.1.5. Installing Patches

The LOGOS server has an integrated patch system with which you can download and install the latest patches and bugfixes from the Internet. Alternatively, you can also install the patches from a data storage device.

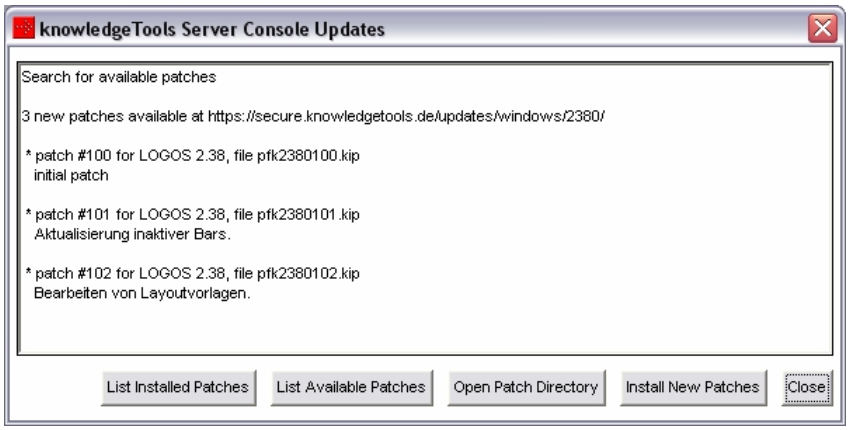
NOTE: Users can only be informed of the availability of new patches and download the patches if the computer that the LOGOS server is installed on has Internet access and can establish a connection to our patch server at: *https://secure.knowledgetools.de*

In order to install an online update, proceed as follows:

1. Start the LOGOS server console if it is not already open.
2. If there are any patches available, then a corresponding message will be displayed at the bottom left-hand corner of the server console (see next illustration).

knowledgeTools Server Console
File Options Backup ?
knowledgeTools
knowledgeTools Server Console
Version: 2380
Patches: nein
Operating System: Microsoft Windows 2000/XP/Vista/Server 2003
Lisp Version: International Allegro CL Enterprise Edition 8.1 [Windows] (Nov 14, 2007 14:26)
Copyright (C) 1999-2007 knowledgeTools International GmbH Berlin
New patches available
Server is running

3. In order to display a list of the available patches, click on the "New patches available". A list of available patches will then be displayed in a new window (see next illustration).


knowledgeTools Server Console Updates
Search for available patches
3 new patches available at https://secure.knowledgetools.de/updates/windows/2380/
* patch #100 for LOGOS 2.38, file pfk2380100.kip
initial patch
* patch #101 for LOGOS 2.38, file pfk2380101.kip
Aktualisierung inaktiver Bars.
* patch #102 for LOGOS 2.38, file pfk2380102.kip
Bearbeiten von Layoutvorlagen.
List Installed Patches
List Available Patches
Open Patch Directory
Install New Patches
Close

4. Install the patches by clicking on [Install New Patches].
5. Once all the patches have been installed, you must then restart the LOGOS server and the LOGOS server console. If you do not do so, there may be a loss of data!
   Stop the server by opening the "File" menu in the LOGOS server console and selecting "Stop Server".
   Close the LOGOS server console. Restart the LOGOS server console and start the server by selecting the "Start Server" option in the "File" menu in the LOGOS server console.

NOTE: After the successful installation of an update, it is absolutely essential that the web browser cache (referred to as "Temporary Internet Files") of each workstation that accesses the LOGOS server be emptied. Otherwise problems may occur during use, as parts of the application in the cache of the browser may conflict with the application on the server.

If your server is unable to establish a connection to our patch server, then you can also install patches from a data storage device. In order to do so, proceed as follows:

1. Start the LOGOS server console if it is not already open.
2. Open the "Options" menu and select the "Download Patches" option.
3. Click on the [Open Patch Directory] button.
4. In the window that now opens, select the data storage device that contains the patches and double-click on the directory that contains the patches.
5. Confirm your selection by clicking on the [OK] button.
6. A list of available patches will then be displayed. Install the patches by clicking on [Install New Patches].
7. Once all the patches have been installed, you must then restart the LOGOS server and the LOGOS server console. If you do not do so, there may be a loss of data! Stop the server by opening the "File" menu in the LOGOS server console and selecting "Stop Server". Close the LOGOS server console. Restart the LOGOS server console and start the server by selecting the "Start Server" option in the "File" menu in the LOGOS server console.

NOTE: After the successful installation of an update, it is absolutely essential that the web browser cache (referred to as "Temporary Internet Files") of each workstation that accesses the LOGOS server be emptied. Otherwise problems may occur during use, as parts of the application in the cache of the browser may conflict with the application on the server.

18.1.6 Creating Backups Manually

If you create a full backup, then all the contents of your LOGOS installation (i.e. knowledgeTools trees, scripts, datarooms, dossiers and dossier contents, processes, tutorials and templates, as well as users and their access rights) will be saved in the backup.

In order to create a full backup of your LOGOS server, proceed as follows:

1. Create a directory where you want the backup to be saved on the computer that the LOGOS server is running on.
2. Start the LOGOS server console by opening the Windows Start menu and then selecting "LOGOS Server Console" in the "LOGOS" program group.
3. Open the "Backup" menu in the server console and select the "Make Full Backup" option.
4. In the window that now opens, select the directory where you want the backup data to be saved (see step 1 above) and confirm your selection by clicking on the [OK] button. The backup will start immediately.

NOTE: Please note that although it is possible to continue working on the server while the backup is being created, the backup process will have a considerable effect on the performance of the system. Therefore, backups should only be created when there are no or only very few users working on the server.

18.1.7. Creating Backups Automatically

You also have the option to create backups automatically. When creating backups automatically, you can determine:

- the day of the week and
- the time

that you want to create the backup on and the directory in which you want the backup to be saved.

In order to set up automatic backups, please proceed as follows:

1. Start the LOGOS server console if it is not already open.
2. Open the "Backup" menu and select the "Configure Backup" option.
3. Select the time when you want the backup to be created using the arrow buttons next to the field labelled "Hour". It is recommended to select a time when there are no or only very few users working on the system.
4. Select the days when you want the backup to be created using the check boxes next to the field labelled "Days". You may select more than one day.
5. Click on the [Browse] button to select the directory where you want the backup to be saved. Navigate to the required directory in the window that opens and select the required directory. Confirm your selection by clicking on [OK].
6. Finish by clicking on [Save] to save your entries.
7. You must restart the LOGOS server for your changes to take effect.

8. Open the "File" menu in the LOGOS server console and select the "Start / Stop Server" option. The LOGOS server will now stop.
9. Click on "Start / Stop Server". The LOGOS server will now start.

18.1.8. Restoring Backups

You have the option to restore backups, which have been created as described above, on the same LOGOS installation or on a LOGOS installation on another server.

NOTE: Please note that you can only restore backups in the same LOGOS version! Therefore, it is not possible e.g. to restore a backup that was created in version 2.38 on a system that is running version 2.39.
Please also note that when you restore the backup, any existing data on the server will be overwritten.

In order to restore a backup, proceed as follows:

1. Start the LOGOS server console by opening the Windows Start menu and then selecting "LOGOS Server Console" in the "LOGOS" program group.
2. The status bar of the server console will display whether the LOGOS server is running. If it is running, the message, "Server is running" will be displayed.
   If the server is running, then please stop the server. In order to do so, open the "File" menu and select the "Start / Stop Server" option.
3. Open the "Backup" menu in the server console and select the "Restore from Backup" option.
4. In the window that now opens, please select the directory in which a previously created backup has been saved and then click on the [OK] button to confirm your selection.
5. You will now be asked whether you want to restore the backup. Confirm this action by clicking on the [Start] button. The restoring of the backup will then start immediately.
6. You will receive a corresponding message once the process has been completed. Click on the [Close] button to close the message.

Please note that restoring the backup will have a noticeable effect on the performance of the server.

18.2. The LOGOS Web Console

Contrary to the LOGOS server console, the LOGOS web console can be accessed in a browser via the Internet. Therefore, it is not necessary to physically have to access the server as a user with administrative access rights at operating system level. The server can now be accessed from anywhere.
In addition, the web console can be used by both Windows installations, as well as Linux installations. However, certain functions that are available when using the server console are not available when using the web console.
The following functions are available in the web console:

- Starting / Stopping the Server
- Installing Patches
- Creating Backups
- Accessing Log Files

NOTE: Please note that the web console should not be permanently open, but rather only to complete administrative tasks. Please exit the web console once you have completed your work by clicking on the "Log out" at the top right-hand corner of the web console.

18.2.1. Accessing the Web Console

NOTE: In order to access the LOGOS web console, you must possess the "User Administrator" administrative access right.

1. Open your web browser.
2. Enter the address of the LOGOS web console and press the Enter key. The address is: "*http://your_server_name:Port/admin*", whereby the port has been set in the LOGOS server console during the installation of the LOGOS server and can also be changed later. In the default setting Port 81 is used.
3. Login with your user access data.

4. You will access the web console interface (see next illustration).

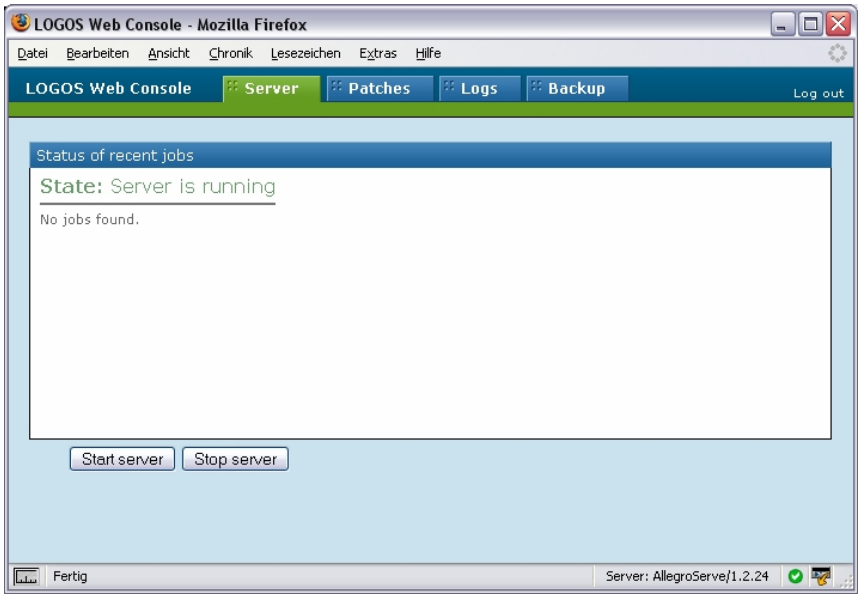


Fig.: The LOGOS web console

18.2.2. Starting / Stopping the Server

NOTE: You should only stop or restart the server if you are sure that there are no other users working on the system. Otherwise stopping or restarting the server may result in the loss of data.

1. Click on the "Server" tab at the top of the screen if the tab is not already active.
2. The current status of the server will be displayed in the upper part of the window. The possible statuses are: "Status: Server is running" or "Status: Server is not running".
3. In order to stop the server, please click on the [Stop server] button. Please ensure that there are no other users active on the server before stopping the server, otherwise the stopping of the server may result in the loss of data! You will receive the corresponding confirmation message after the server has been successfully stopped.
4. In order to start the server, please click on the [Start Server] button. You will receive the corresponding confirmation message after the server has been successfully started.

18.2.3. Installing Patches

The LOGOS server has an integrated patch system with which you can download and install the latest patches and bugfixes from the Internet. Alternatively, you can also install the patches from a data storage device.

NOTE: The download of patches from the Internet is only possible if the computer that the LOGOS server is installed on has Internet access and can establish a connection to our patch server at: *https://secure.knowledgetools.de*

In order to download and install patches from the Internet, proceed as follows:

1. Click on the "Patches" tab at the top of the screen if this tab is not already active.
2. You will see the patches that can be installed or are already installed in a window labelled "List of installed and installable patches". Click on the [Show new patches] button to connect to the patch server and check whether there are new patches available. If there are new patches available, then the numbers and names of these patches will be displayed.
3. Click on the [Install new patches] button.
4. Click [OK] button in the window that opens and the download and installation of the patches will be executed.
5. You will receive a corresponding message after the successful installation of the patches. You must now restart the server.
6. Please click on the "Server" tab at the top of the screen and then on the [Stop Server] button. You will receive a message when the server has been stopped.
7. Click on the [Start Server] button and the server will restart. You will receive the following message after the successful start of the server: "Status: Server is running".

NOTE: After the successful installation of patches, it is absolutely essential that the web browser cache (referred to as "Temporary Internet Files") of each workstation that accesses the LOGOS server be emptied. Otherwise problems may occur during use, as parts of the application in the cache of the browser may conflict with the application on the server.

In order to install patches from a data storage device, proceed as follows:

1. Click on the "Patches" tab at the top of the screen if this tab is not already active.
2. You will see the patches that can be installed or are already installed in a window labelled "List of installed and installable patches". Click on the [Show new patches] button to connect to the patch server and check whether there are new patches available. If there are new patches available, then the numbers and names of these patches will be displayed.
3. Click on the [Browse] button and then select the data storage device that contains the patches in the window that opens. The patches are supplied in the form of ZIP files. Select the ZIP file on the data storage device and click on the [Open] button.

4. Click on the [Upload] button and the patches will be copied to the server and installed.
5. You will receive a corresponding message after the successful installation of the patches. You must now restart the server.
6. Please click on the "Server" tab at the top of the screen and then on the [Stop Server] button. You will receive a message when the server has been stopped.
7. Click on the [Start Server] button and the server will restart. You will receive the following message after the successful start of the server: "Status: Server is running".

18.2.4. Accessing Log Files

During the operation of the LOGOS server, various log files are created that can be used to analyse technical problems if they occur. In order to access log files, click on the "Logs" tab at the top of the screen. The existing log files will then be displayed in the "Log Files" window. Click on the name of a log file to open or download it.

18.2.5. Creating Backups

If you create a full backup using the backup function, then all the contents that you have created on your LOGOS installation (i.e. knowledgeTools trees, scripts, datarooms, dossiers and dossier contents, processes, tutorials and templates, as well as users and their access rights) will be saved in the backup.

NOTE: The backup function secures all the relevant data of your server in a directory on the same computer. However, you are responsible for the storage of the directory on a backup data storage device, e.g. a type drive.

NOTE: Please note that although it is possible to continue working on the server while the backup is being created, the backup process will have a considerable effect on the performance of the system. Therefore, backups should only be created when there are no or only very few users working on the server.

When you create backups using the web console (as opposed to creating backups using the server console), you do not have the option to determine a backup directory of your choice. Instead, the backup will be saved in the default "backup" directory in the installation directory.

In order to create a full backup, proceed as follows:

1. Click on the "Backup" tab at the top of your screen if the tab is not already active.
2. Click on the [Create Backup] button and the backup will be created immediately.

The backup can only be restored using the LOGOS server console (see above).

19. Handling Technical Problems

LOGOS is a robust that has undergone countless automatic and manual tests prior to being supplied. Nevertheless, the fact that we are dealing with an overall system of great complexity, particularly in terms of the necessary interaction with software components from other software providers, means that it is impossible to completely rule out any problems when working with LOGOS. In general, these problems only affect the display of data in the client and the loss of data that is saved on the server is unlikely.

NOTE: You are strongly advised to implement regular backups of the system in order to avoid any loss of data.

19.1. Resolving Problems

In the event of any problems when working with LOGOS, you should first check whether your workstation meets the necessary system requirements for working with LOGOS. This particularly applies with regard to the version of your web browser, the version of Flash player that you have installed and the security settings of your web browser. The system requirements with regard to your web browser, Flash player and the necessary security settings are described earlier in the User's Manual.

You should then check whether you possess the necessary access rights in order to perform the required tasks. In any cases of doubt, please contact the administrator of your server.

If, in spite of meeting the system requirements, setting the right security settings and possessing the necessary access rights, the problem still persists, the problem can usually be resolved by reloading the LOGOS client in your web browser. In order to do so, click on the "Reload" button in your browser or press the F5 key.

NOTE: Please note that if you click on the "Reload" button, any data that has not yet been saved will be lost. Any data that was already saved in a process can be accessed by reopening the process.

In certain cases, the internal reporting system of the LOGOS server will inform you of problems (please refer to chapter 18.2 below).

19.2. Reporting Problems

The LOGOS server has an internal reporting system that analyses any problems that occur and then compiles a qualified report on the problem that can then be sent to knowledgeTools. This makes it possible to quickly identify, assess and resolve problems.

In the event of certain problems, the reporting system window appears on the user interface as displayed in the following illustration.

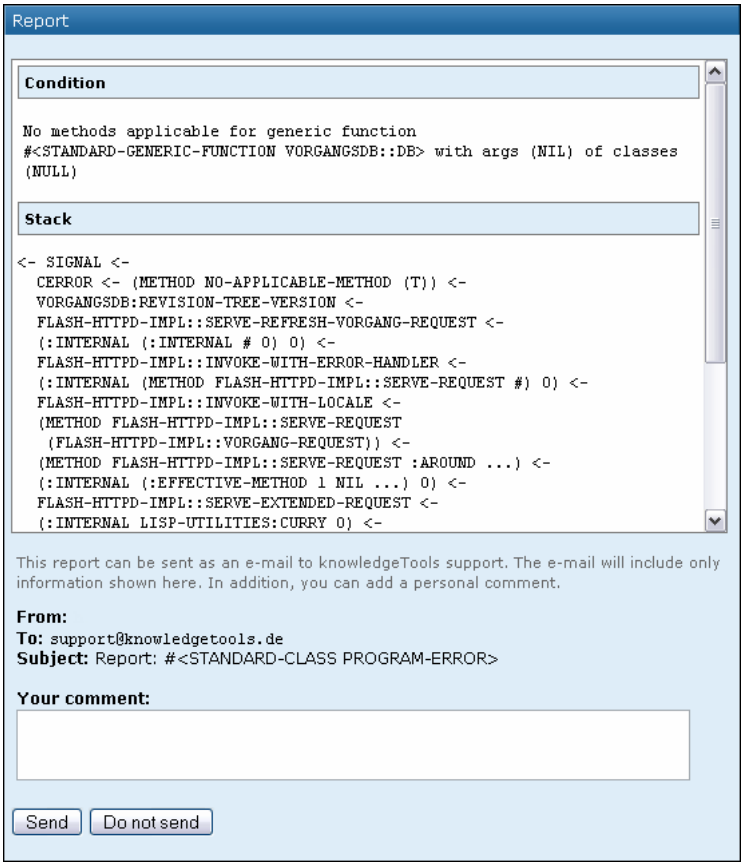


Fig.: The problem report window

The upper part of the window contains the qualified problem report. You can send this report to knowledgeTools by e-mail. In order to do so, click on the [Send] button. It is always helpful, if you can also enter the precise working situation, in which the problem that you are reporting occurred, in the input field labelled "Your Comment"; therefore it is essential that you complete this field prior to sending the report.

You will receive confirmation when the report has been successfully sent. If you are unable to send the report, then please copy the text from the upper part of the window and send it to knowledgeTools at a later time.

20. Final Note

LOGOS is continuously being developed and improved. Please note that individual functions may consequently change within the scope of updates or upgrades.

In the event of any technical queries or problems, please do not hesitate to contact our technical support by e-mail at support@knowledgetools.de.